AMS infoAdvantage

AMS infoAdvantage Business Objects Training

Presented by CGI-AMS

July 21, 2005

Agenda

- Introduction to AMS *info*Advantage
- Business Objects Concepts and Applications
- Lessons
  - Basic navigation
  - Demonstration
  - Question/Discussion
  - Exercises

eMARS Management Administrative & Reporting System

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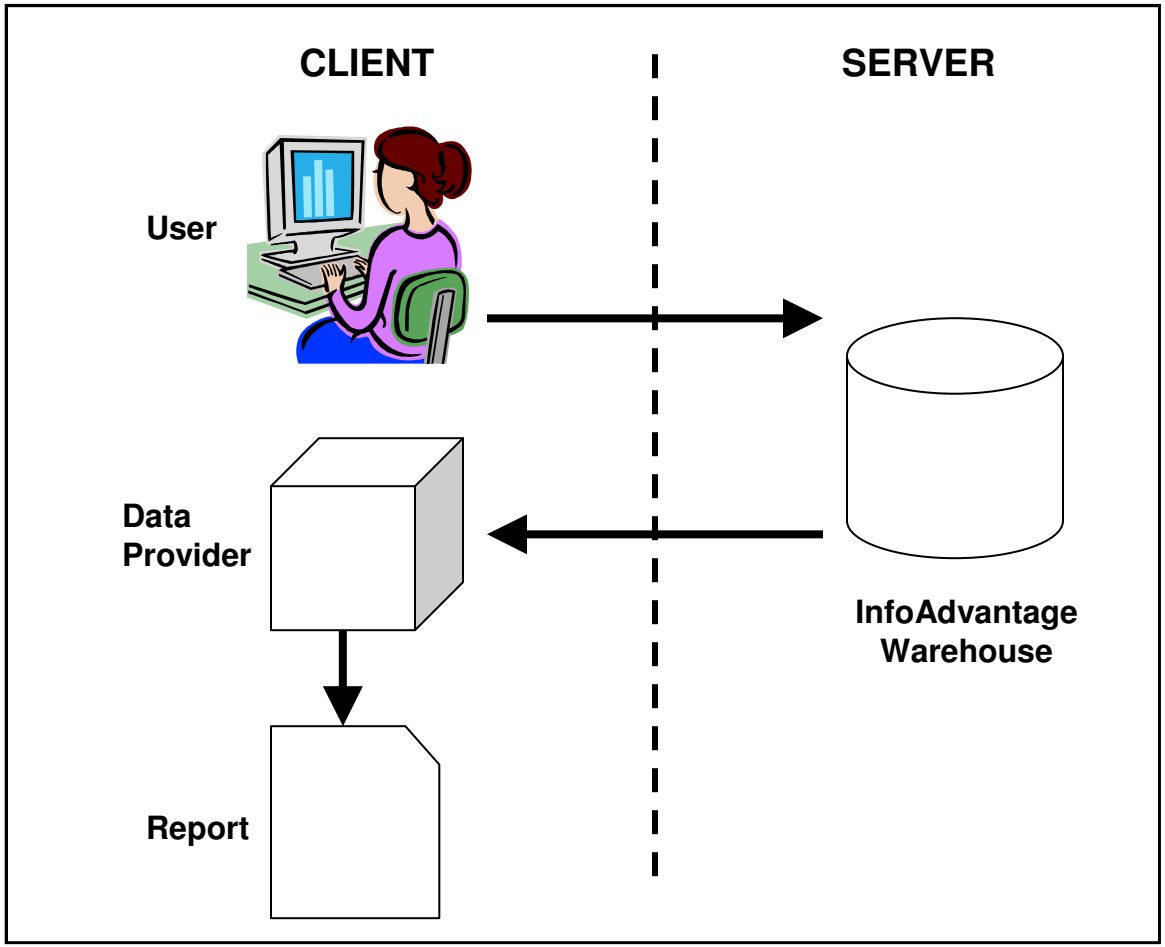
infoAdvantage Reporting Capabilities

- Simple and complex queries
- Flexible report lay out (slice and dice, breaks, sort on fields)
- Detail and Summary information in one report
- Logos, cross tabs and charts in reports
- Use any field in the Data Warehouse to query or filter on

AMS infoAdvantage – Thick Client

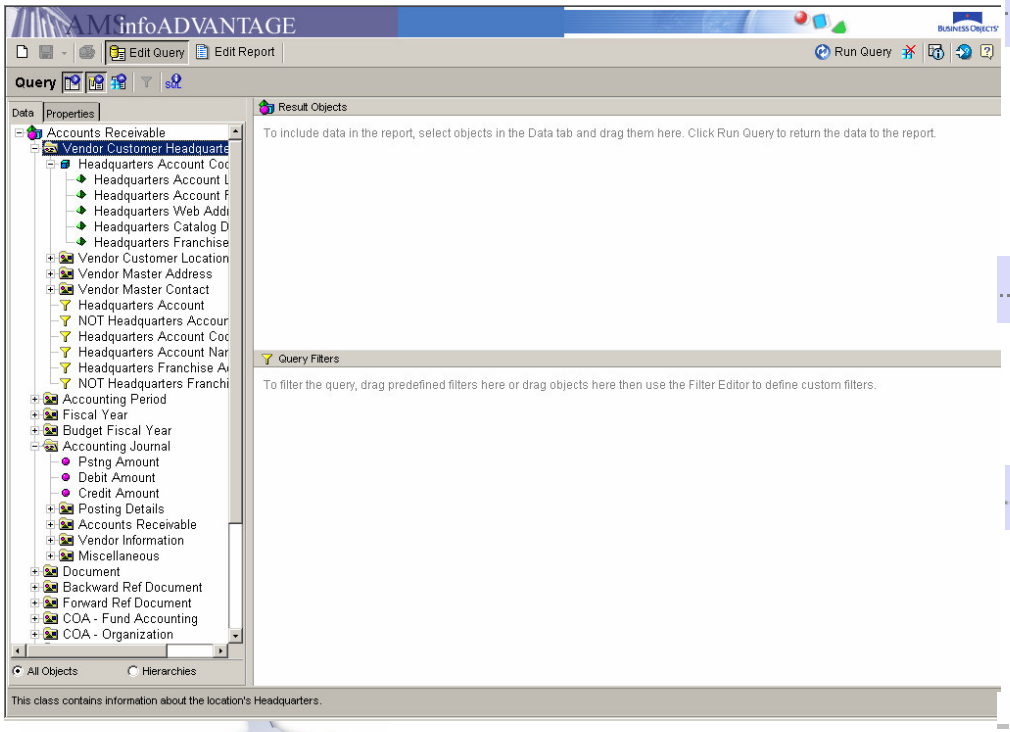
- Needs client installation on desktop
- Allows user to work offline/not connected to database
  - Make changes and Save files locally
  - Load them up to repository when connected later
- Allows for more complex and flexible report layout
  - More complex table options (collapse data etc)
  - Hardcode SQL
    - Only recommended for testing purposes (by pass security set up)
- Retrieve, run thick client and thin client reports

The Query Process



Universe, Class, Object

Universe shows db fields related to certain functional area.
Example: Accounts Receivable



Report Objects

- Class. Contains logical groups of related objects
- Dimension object. Default object type, typically key objects, and are objects that reports will be based on
- Detail object. Always associated with a dimension object
- Measure object. Numeric data (like amounts). Summarized by default
- Filters: special kind of object

eMARS Management Administrative & Reporting System

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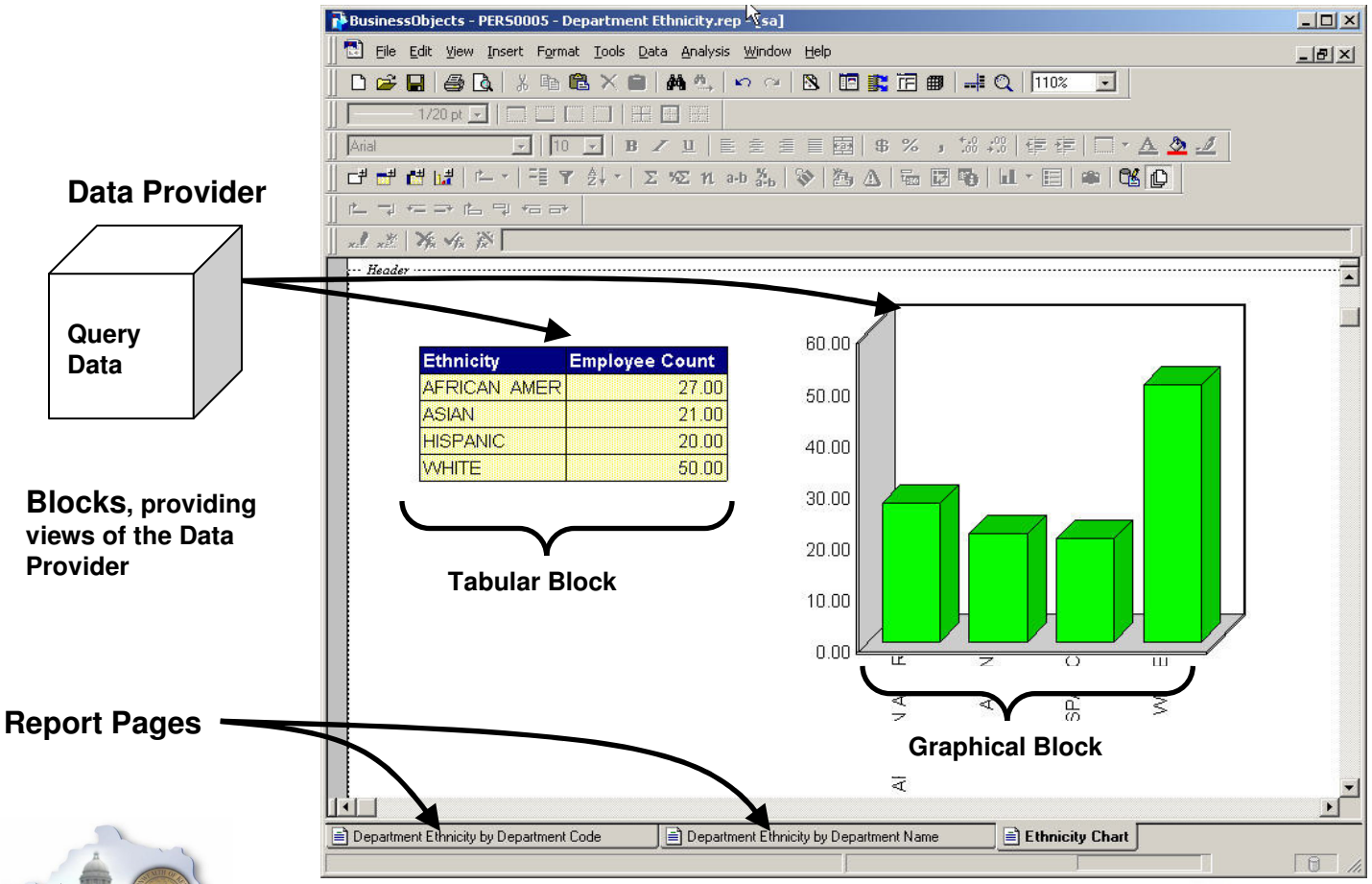
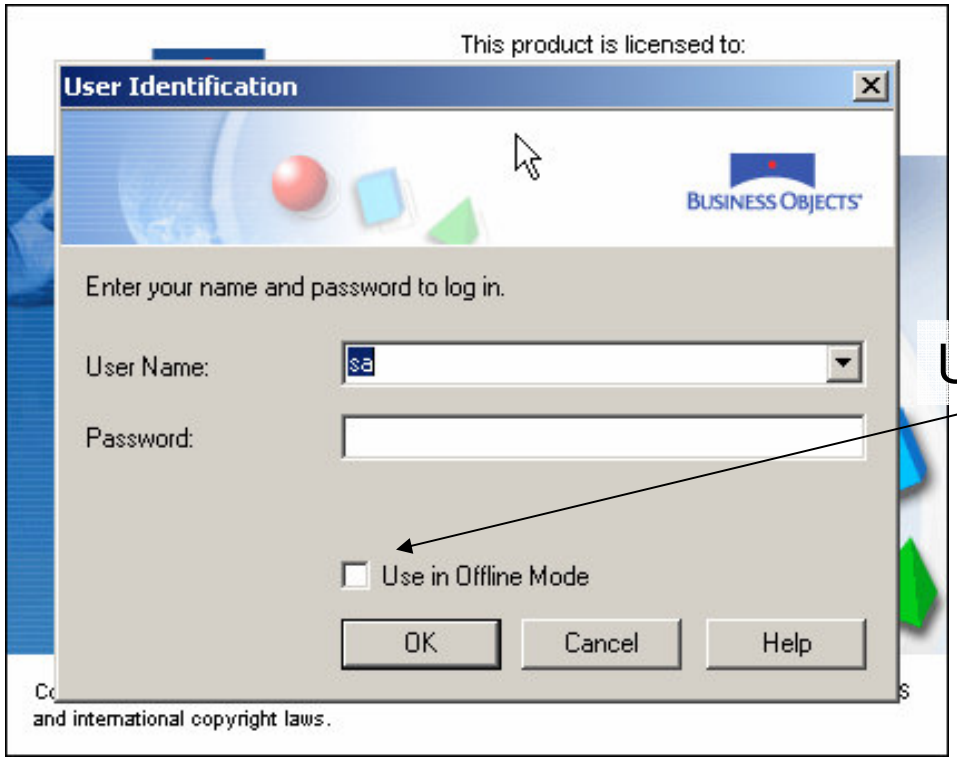
Documents

A Document is composed of three main parts:



Starting Business Objects

Start > Programs > Business Objects > Business Objects 6.1

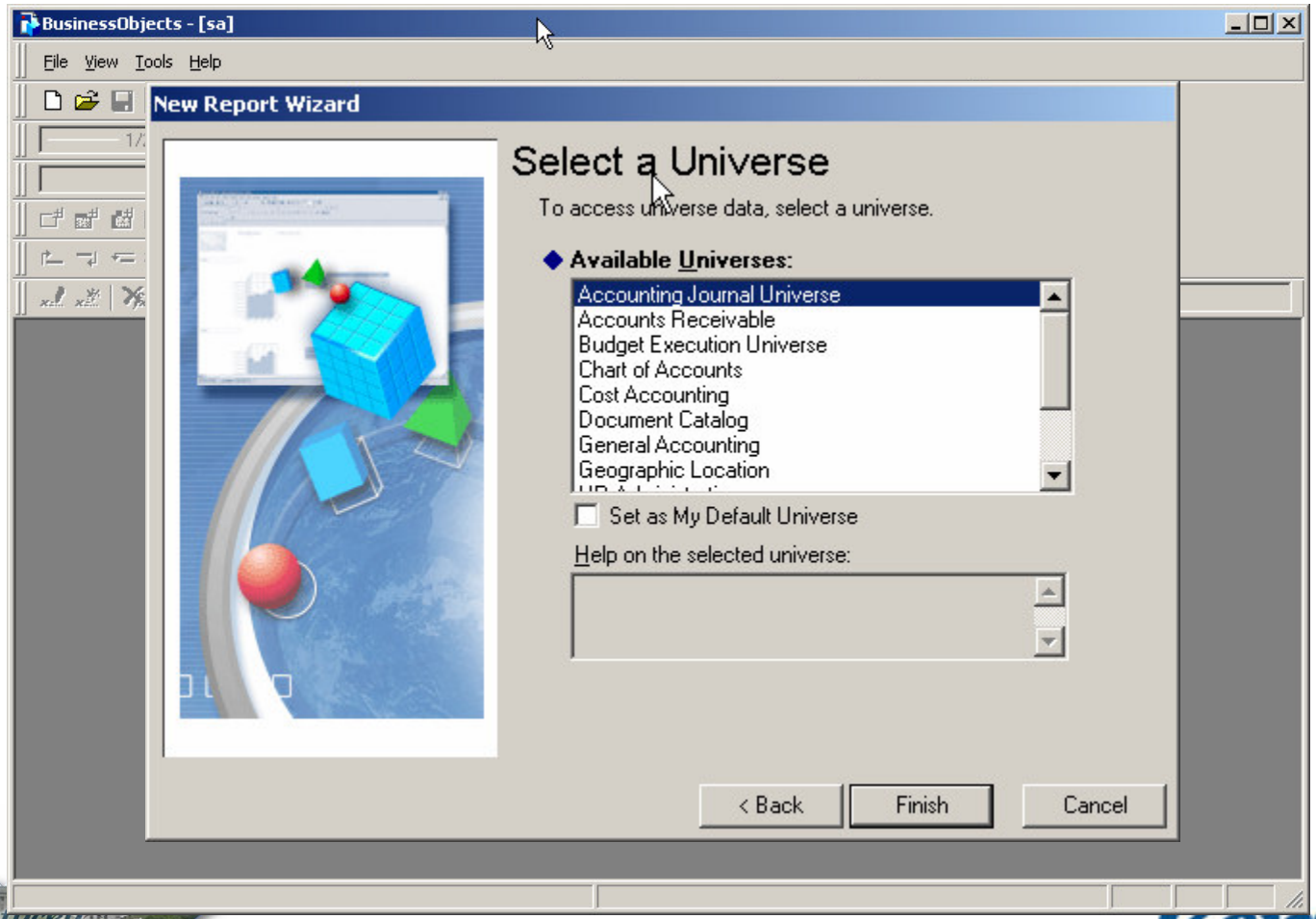


Use in Offline Mode

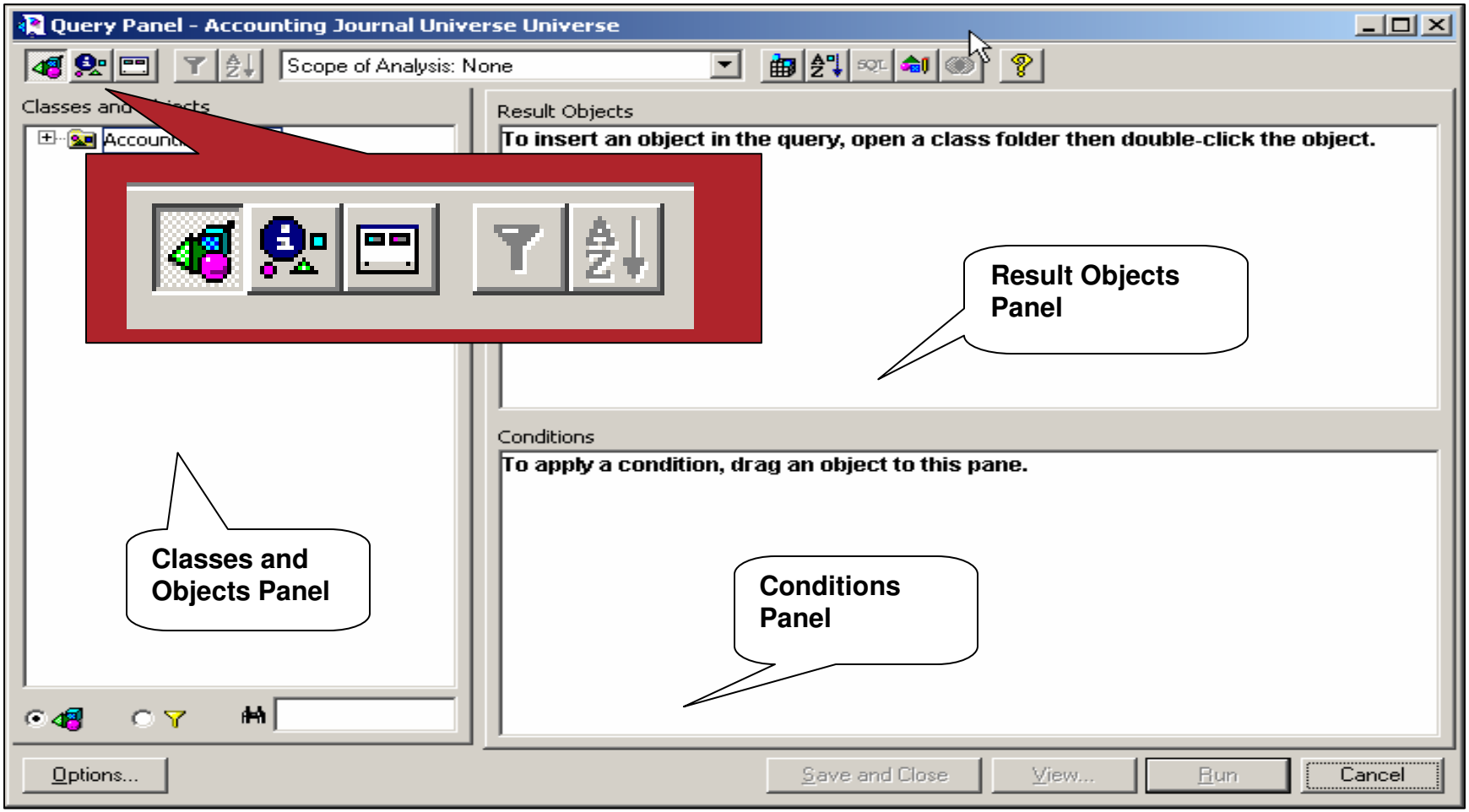
If your attempt to log in fails on a number of consecutive occasions you will 'strike out', the default 'strike out' is set to 3 tries. Business Objects will not allow you access until your Business Objects Supervisor has reset your login.

Building a Query

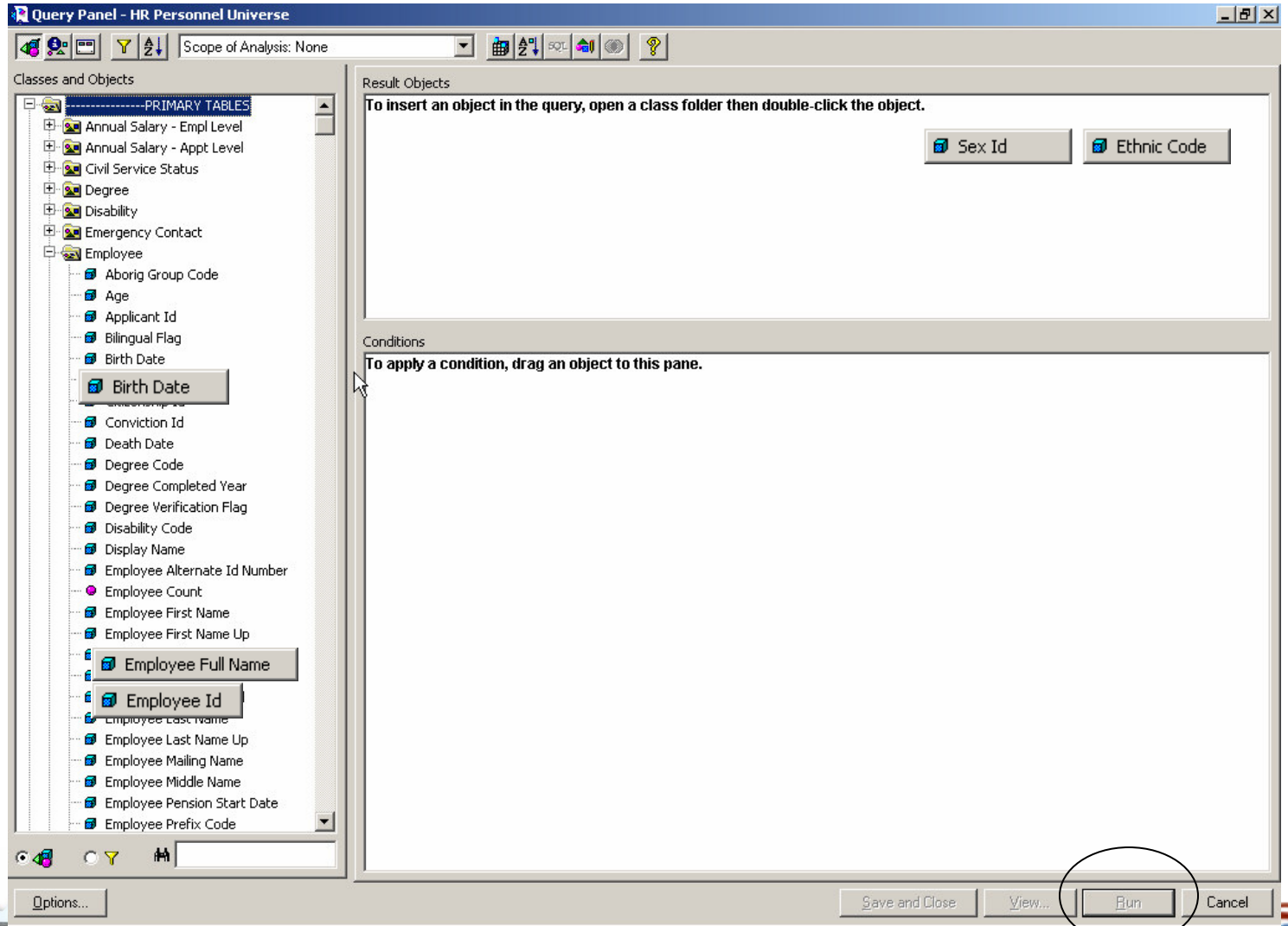
Creating a new document



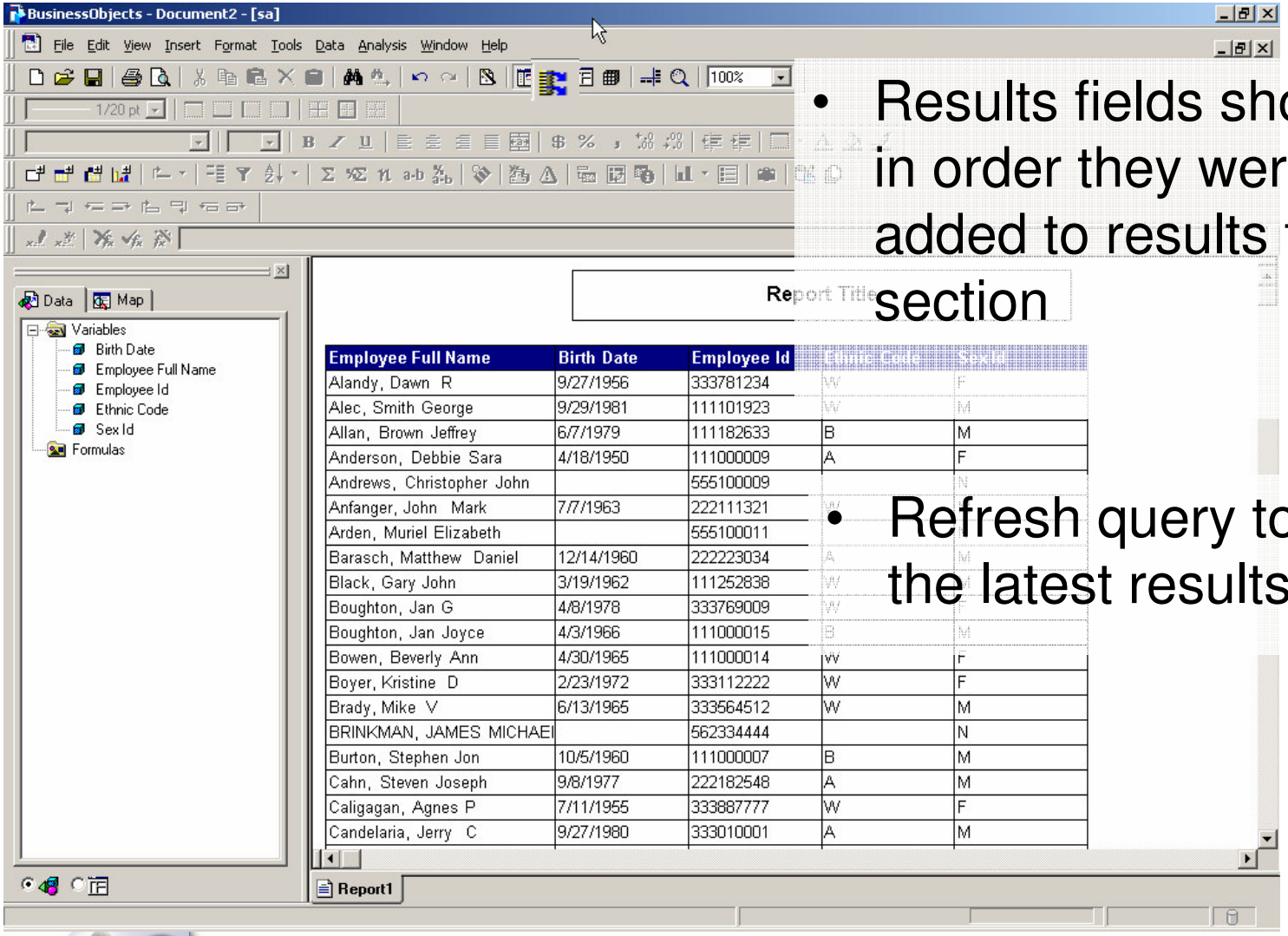
The Query Panel



Building a Query

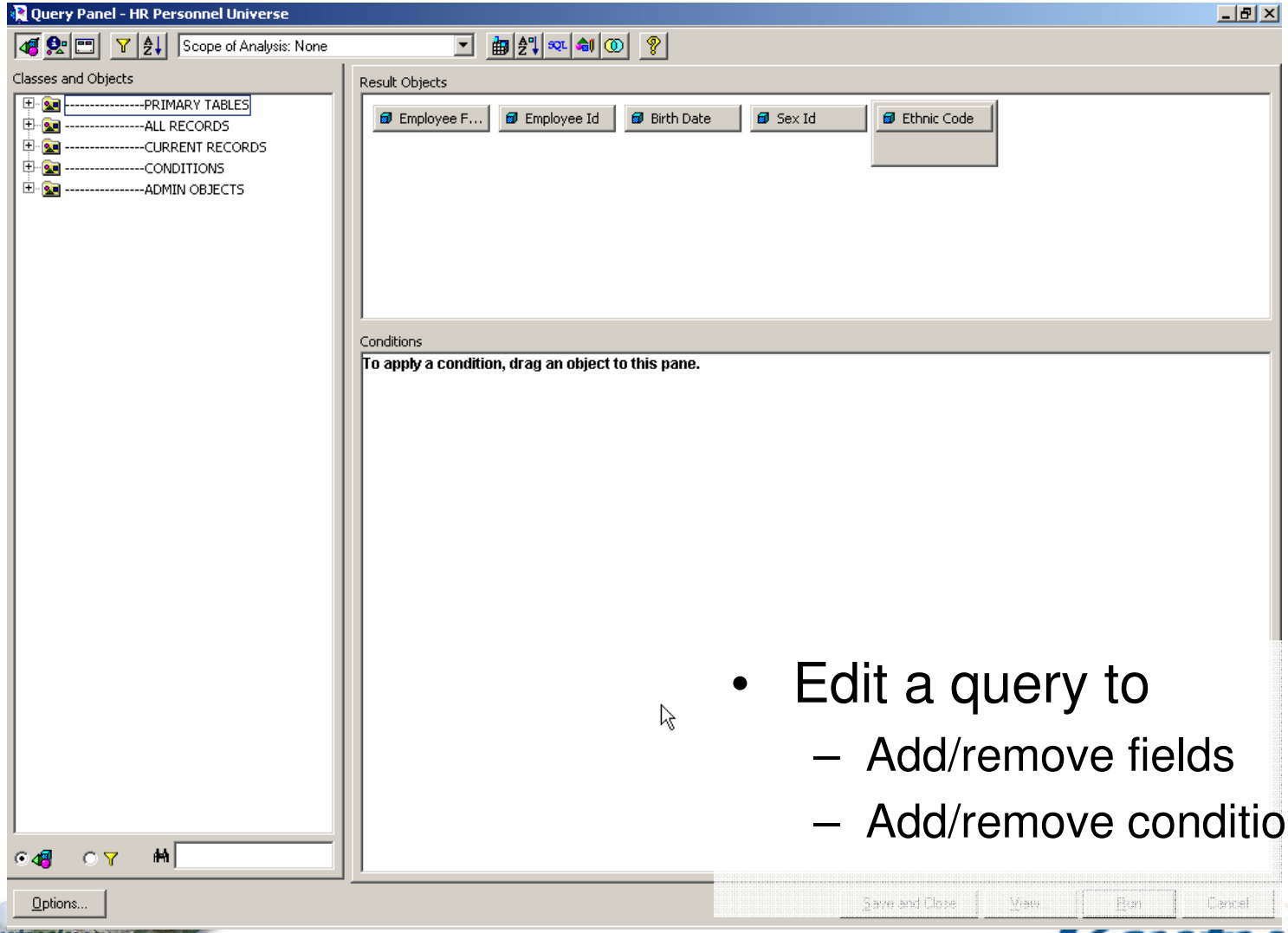


Refreshing a Query



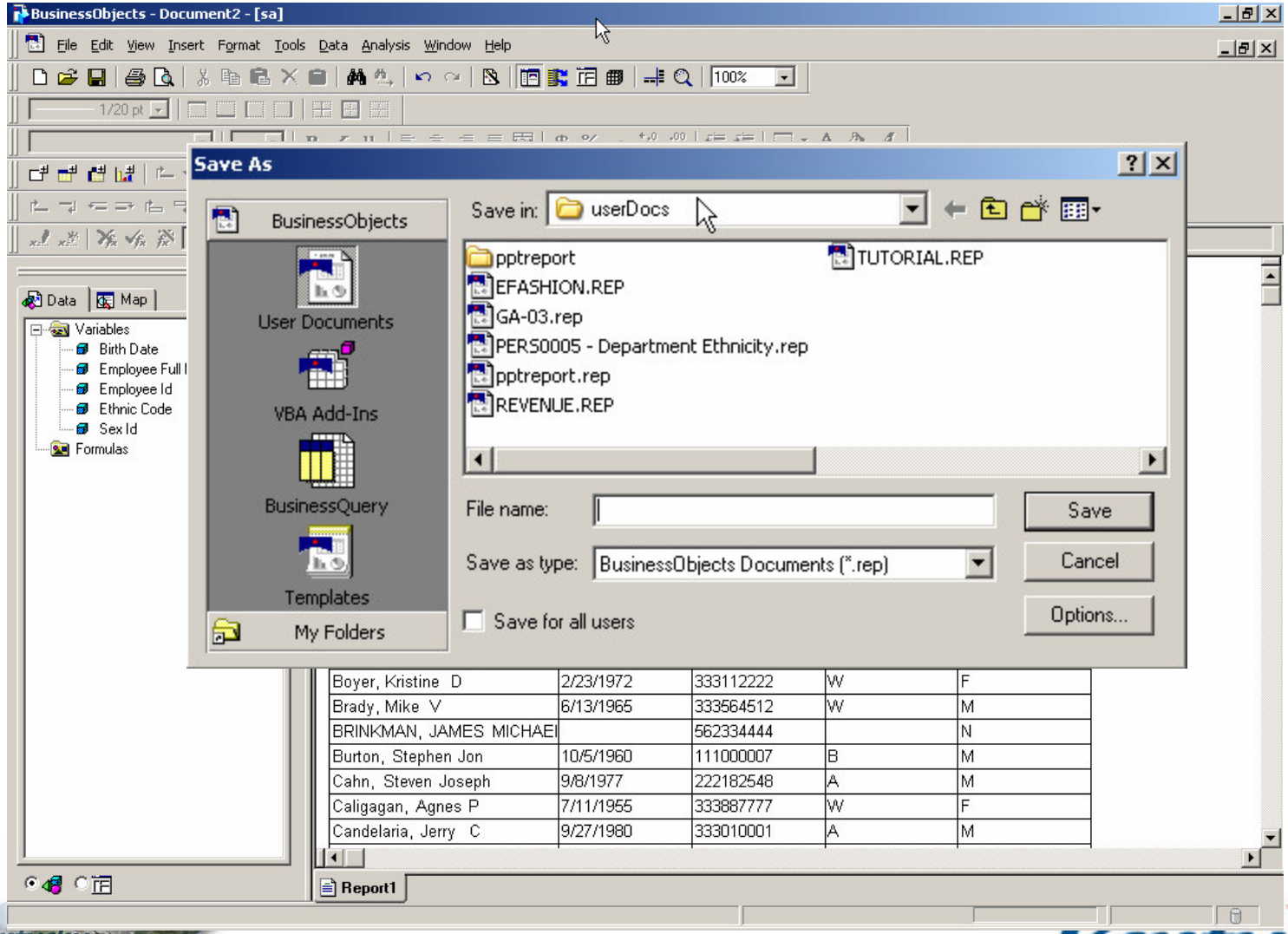
- Results fields show up in order they were added to results fields section
- Refresh query to get the latest results

Editing a Query



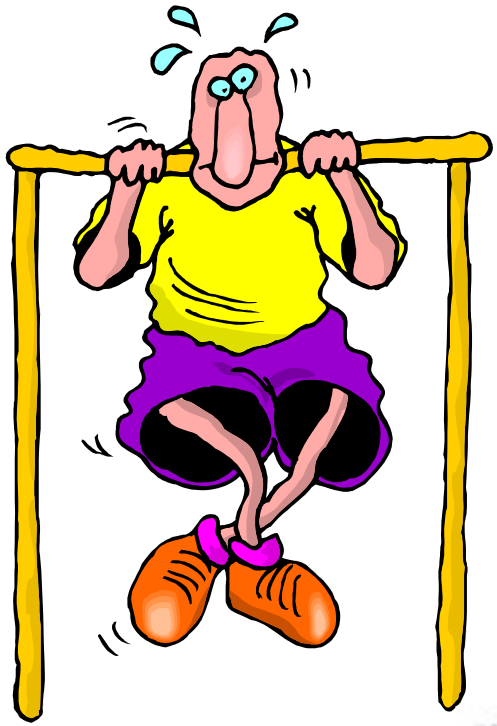
- Edit a query to
  - Add/remove fields
  - Add/remove conditions

Saving a Query



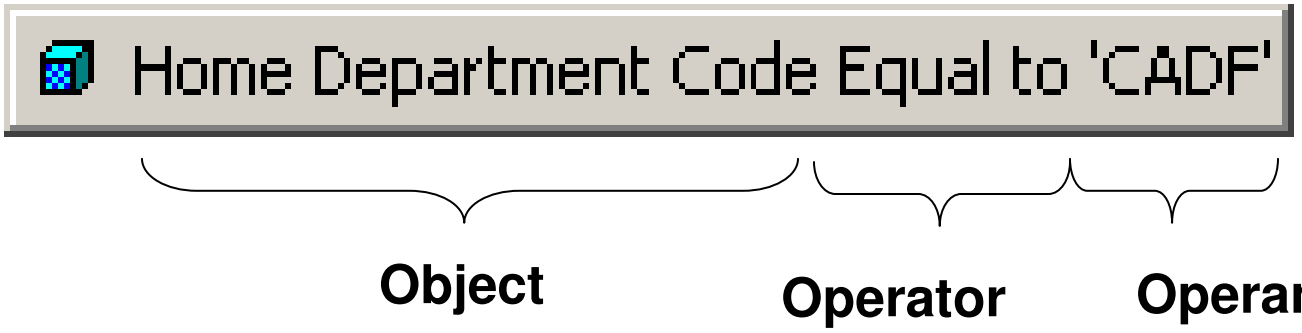
Workshop 1a

- Set up:
  - View -> Toolbars
  - Add: Formatting, Formula
- Create a query
  - Choose universe: Accounts Receivable
  - Select fields:
    - Vendor Customer Headquarters – Headquarters Account Code
    - Accounting Journal – Pstng Amount
    - Posting Code – Posting Code
- Save query



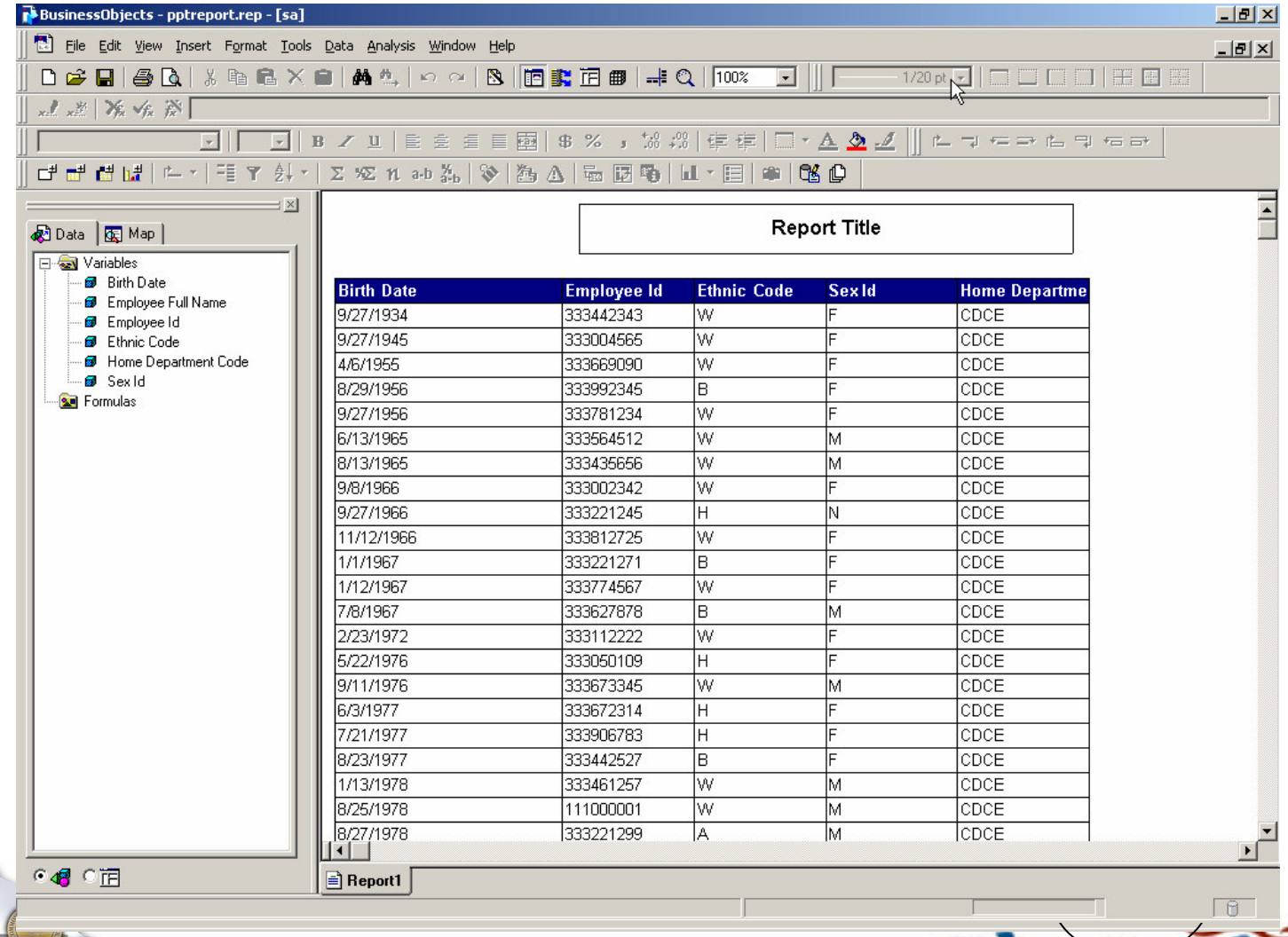
Query Conditions

- Restricting data through applying conditions
- Conditions are constructed the following way:



- Can be predefined or created ad-hoc for specific report
- Can be simple: ‘object equals value’ or more complex (values in between, prompts, etc)

Query Conditions

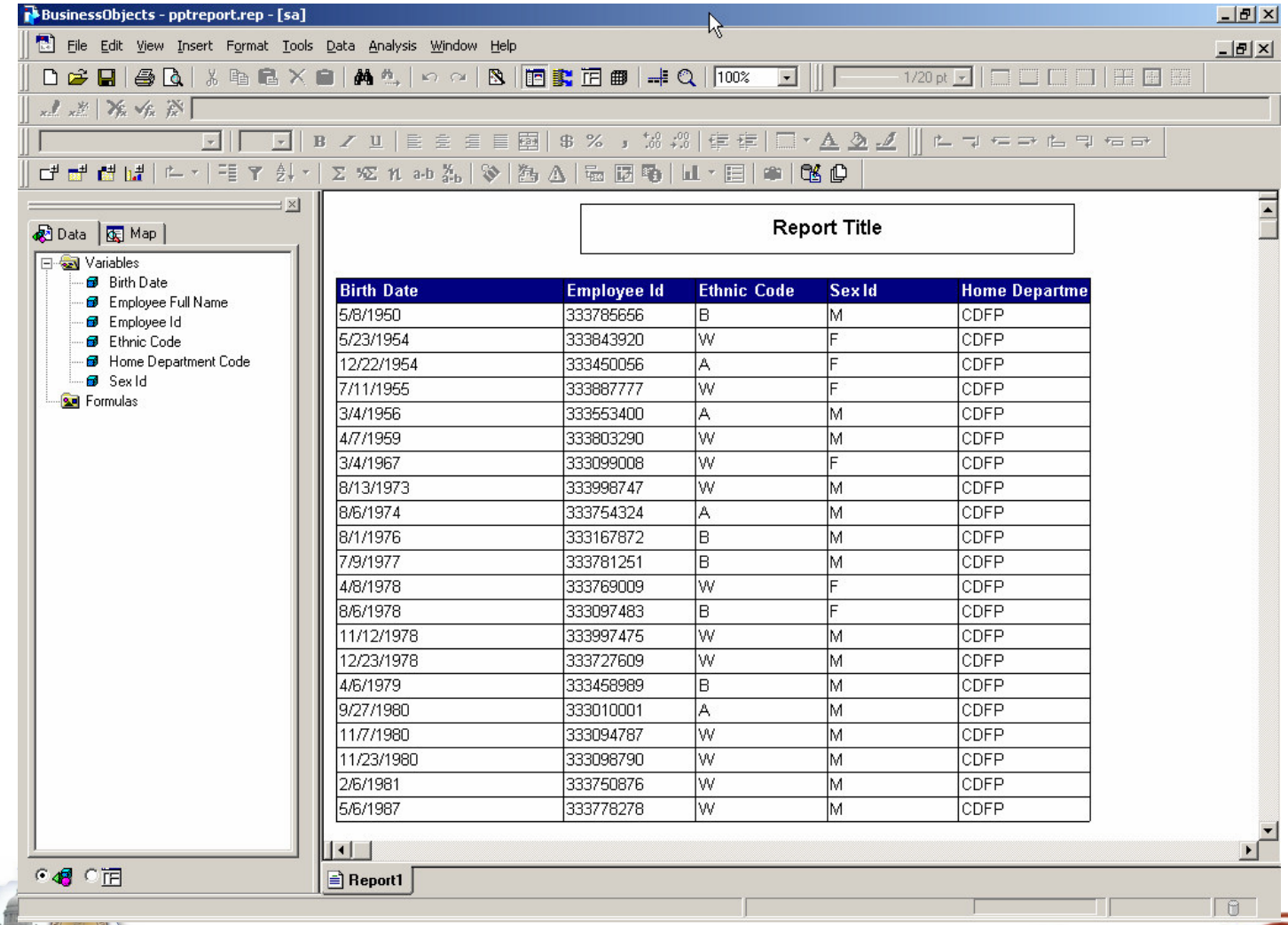


Birth Date	Employee Id	Ethnic Code	Sex Id	Home Departme
9/27/1934	333442343	W	F	CDCE
9/27/1945	333004565	W	F	CDCE
4/6/1955	333669090	W	F	CDCE
8/29/1956	333992345	B	F	CDCE
9/27/1956	333781234	W	F	CDCE
6/13/1965	333564512	W	M	CDCE
8/13/1965	333435656	W	M	CDCE
9/8/1966	333002342	W	F	CDCE
9/27/1966	333221245	H	N	CDCE
11/12/1966	333812725	W	F	CDCE
1/1/1967	333221271	B	F	CDCE
1/12/1967	333774567	W	F	CDCE
7/8/1967	333627878	B	M	CDCE
2/23/1972	333112222	W	F	CDCE
5/22/1976	333050109	H	F	CDCE
9/11/1976	333673345	W	M	CDCE
6/3/1977	333672314	H	F	CDCE
7/21/1977	333906783	H	F	CDCE
8/23/1977	333442527	B	F	CDCE
1/13/1978	333461257	W	M	CDCE
8/25/1978	111000001	W	M	CDCE
8/27/1978	333221299	A	M	CDCE

Prompts

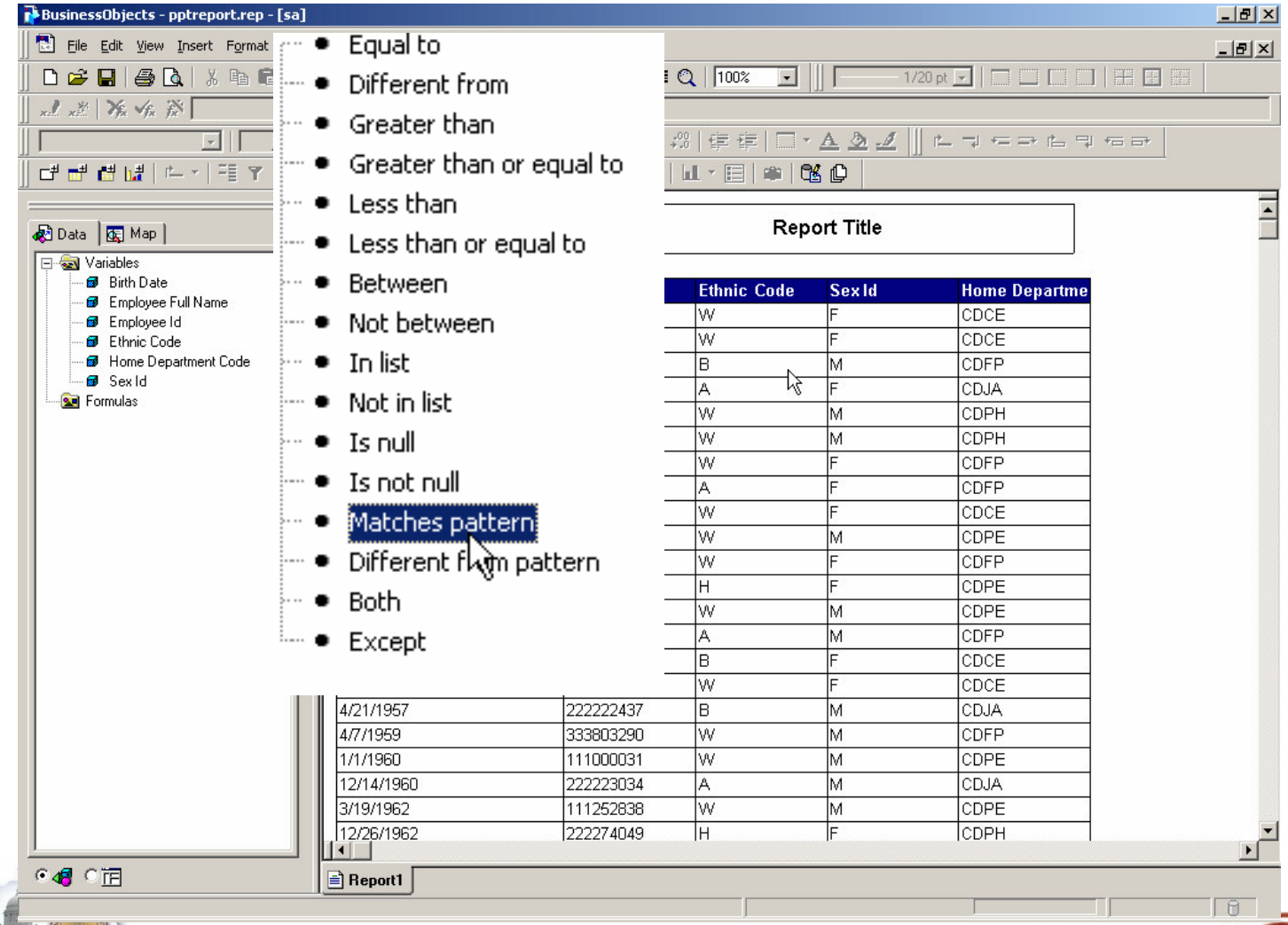
- Prompts allow user to enter values for conditions during runtime
  - Each time report is run, different values can be entered
  - User can choose from values list (no typos)
- Reduces maintenance for reports/documents
- Examples:
  - Fiscal Year
  - Reporting period
  - Department/Unit

Prompts

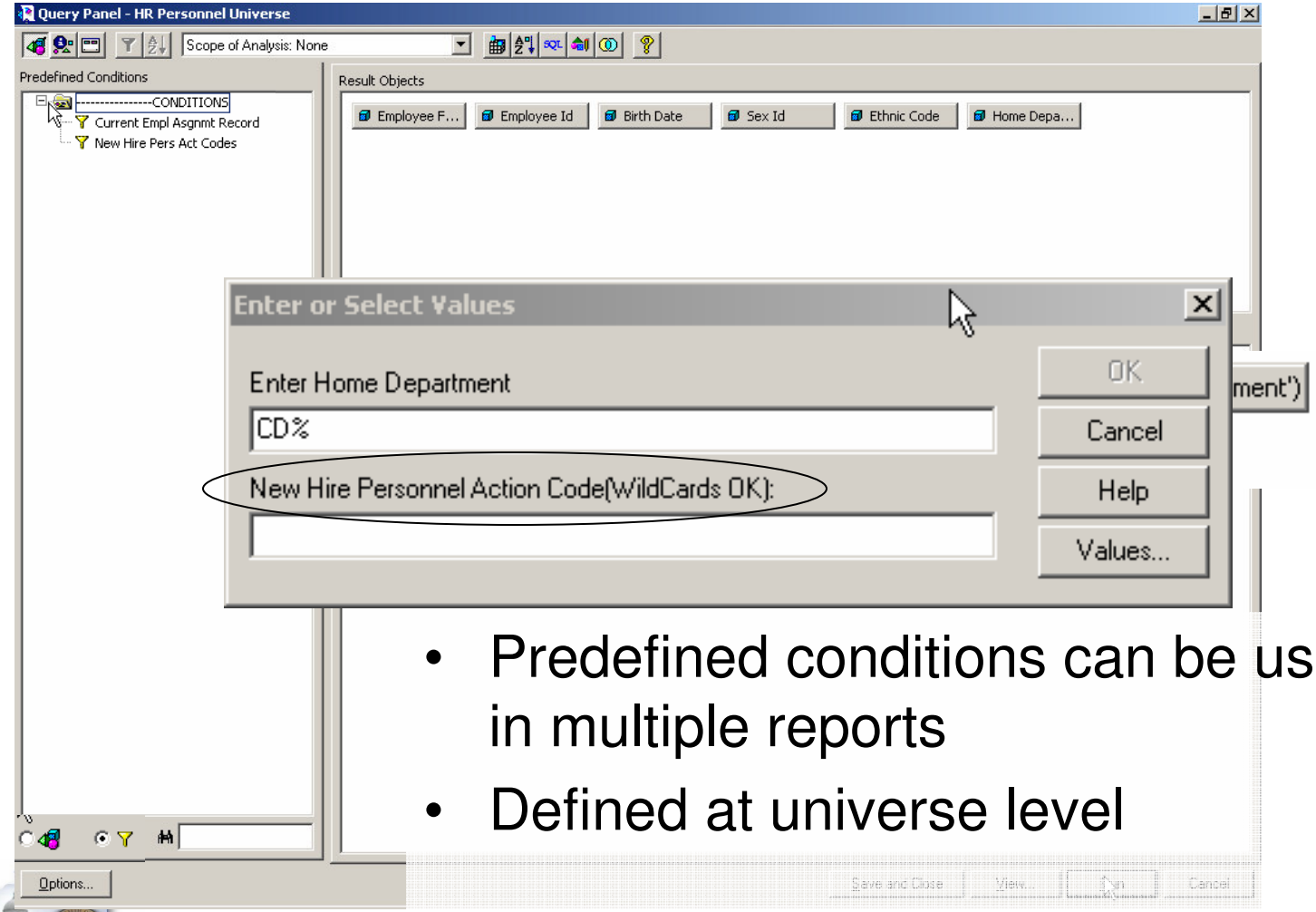


Birth Date	Employee Id	Ethnic Code	Sex Id	Home Departme
5/8/1950	333785656	B	M	CDFP
5/23/1954	333843920	W	F	CDFP
12/22/1954	333450056	A	F	CDFP
7/11/1955	333887777	W	F	CDFP
3/4/1956	333553400	A	M	CDFP
4/7/1959	333803290	W	M	CDFP
3/4/1967	333099008	W	F	CDFP
8/13/1973	333998747	W	M	CDFP
8/6/1974	333754324	A	M	CDFP
8/1/1976	333167872	B	M	CDFP
7/9/1977	333781251	B	M	CDFP
4/8/1978	333769009	W	F	CDFP
8/6/1978	333097483	B	F	CDFP
11/12/1978	333997475	W	M	CDFP
12/23/1978	333727609	W	M	CDFP
4/6/1979	333458989	B	M	CDFP
9/27/1980	333010001	A	M	CDFP
11/7/1980	333094787	W	M	CDFP
11/23/1980	333098790	W	M	CDFP
2/6/1981	333750876	W	M	CDFP
5/6/1987	333778278	W	M	CDFP

Wildcard Prompts

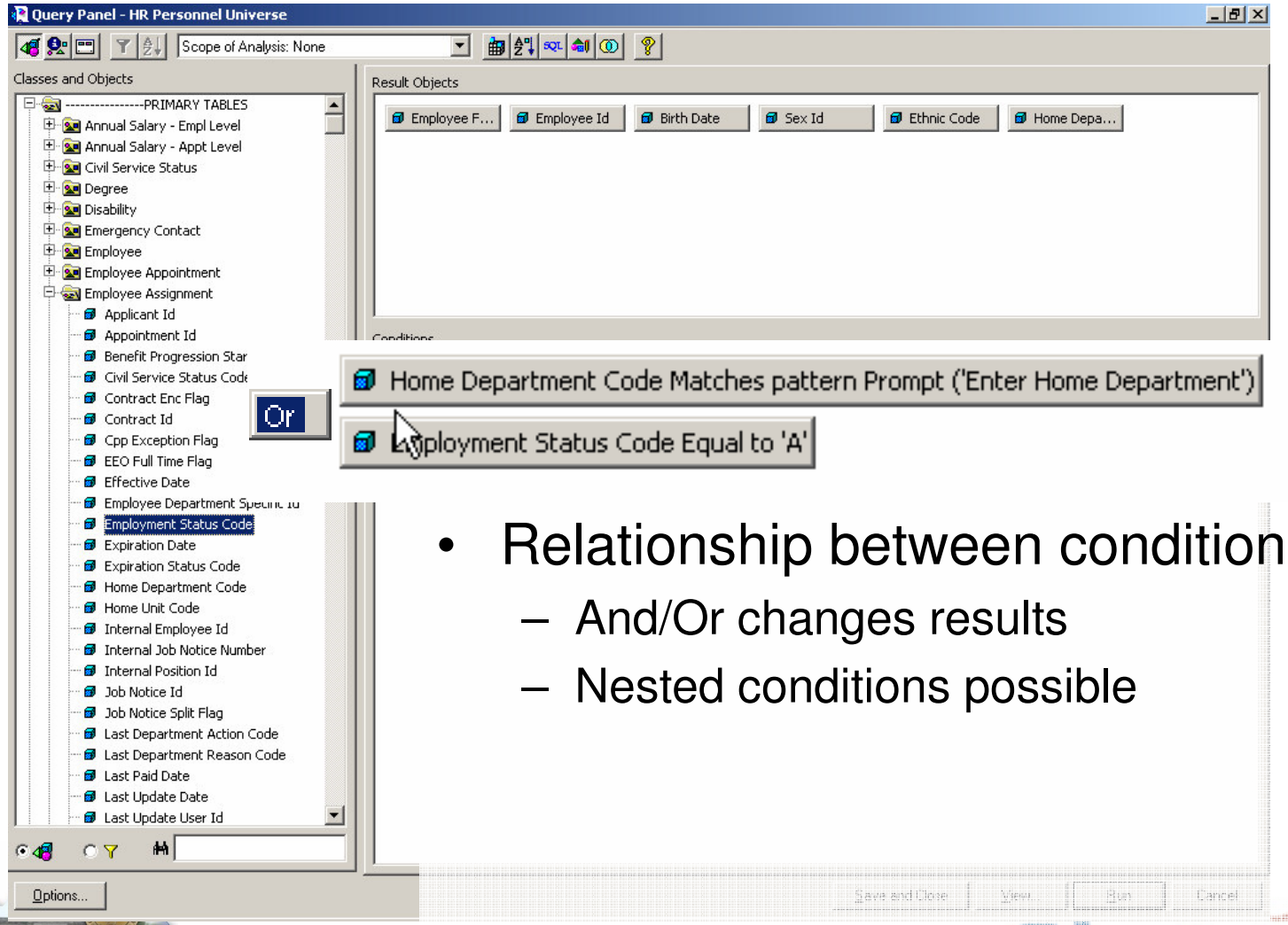


Predefined condition Objects



- Predefined conditions can be used in multiple reports
- Defined at universe level

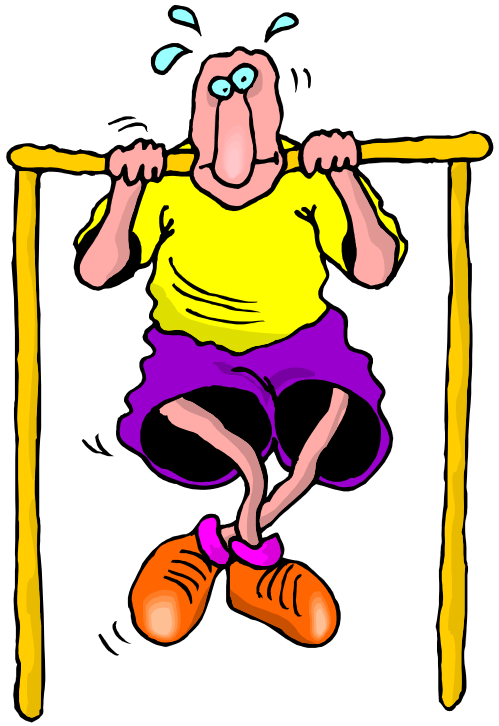
Logical Operators



- Relationship between conditions:
  - And/Or changes results
  - Nested conditions possible

Workshop 2 – Add conditions

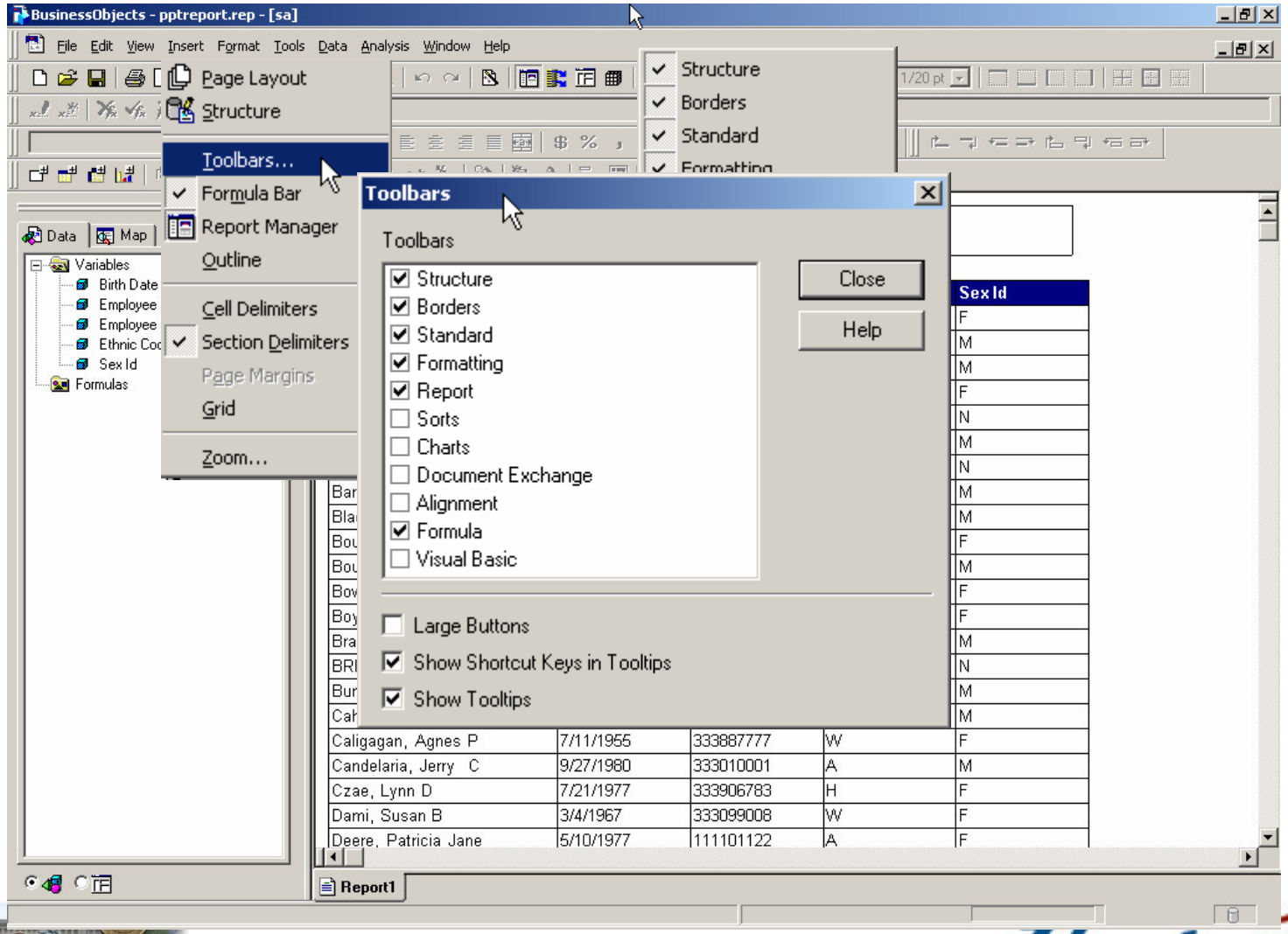
- Open Report 1
- Add condition to only include amounts between 1000 and 5000 dollar
- Add a condition to only include Vendor Customer Headquarters Account Codes like ‘ALA’
- Modify previously added condition to be a prompt
- Save query



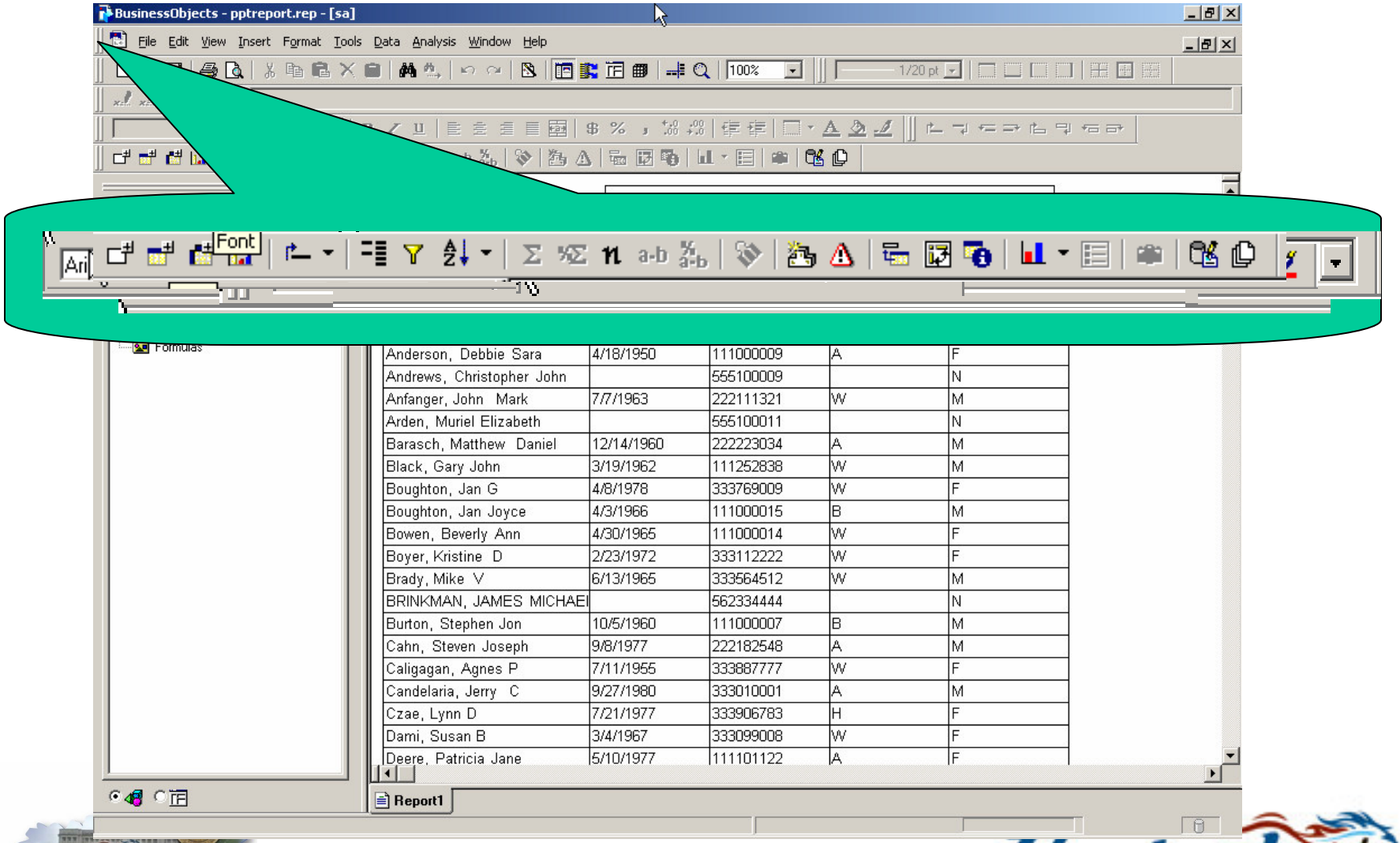
Manipulating Data

- Use report toolbars to change data display
- Add/remove columns
- Resize columns
- Move tables
- Format cell layout

Report Manager Toolbars

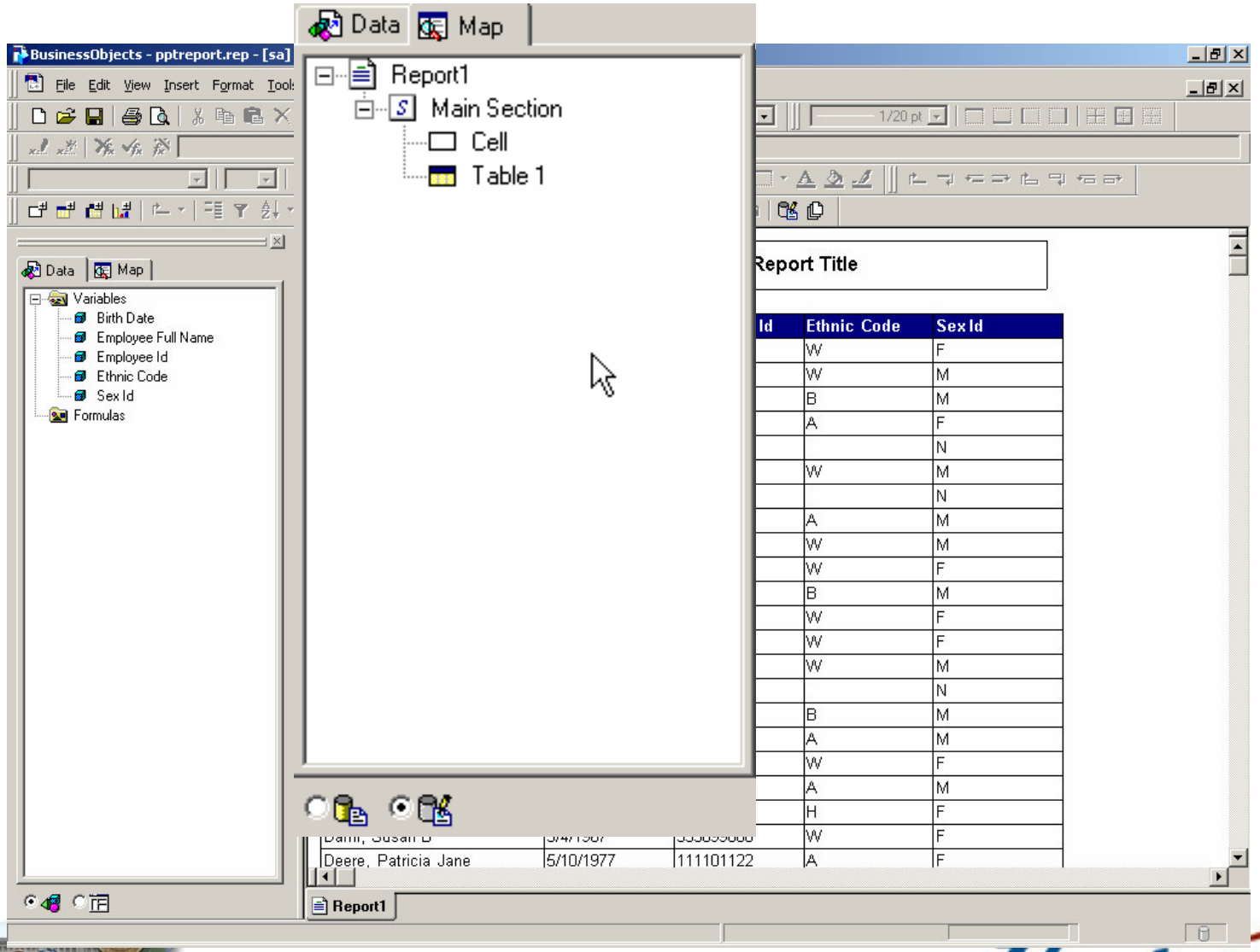


Report Manager Toolbars

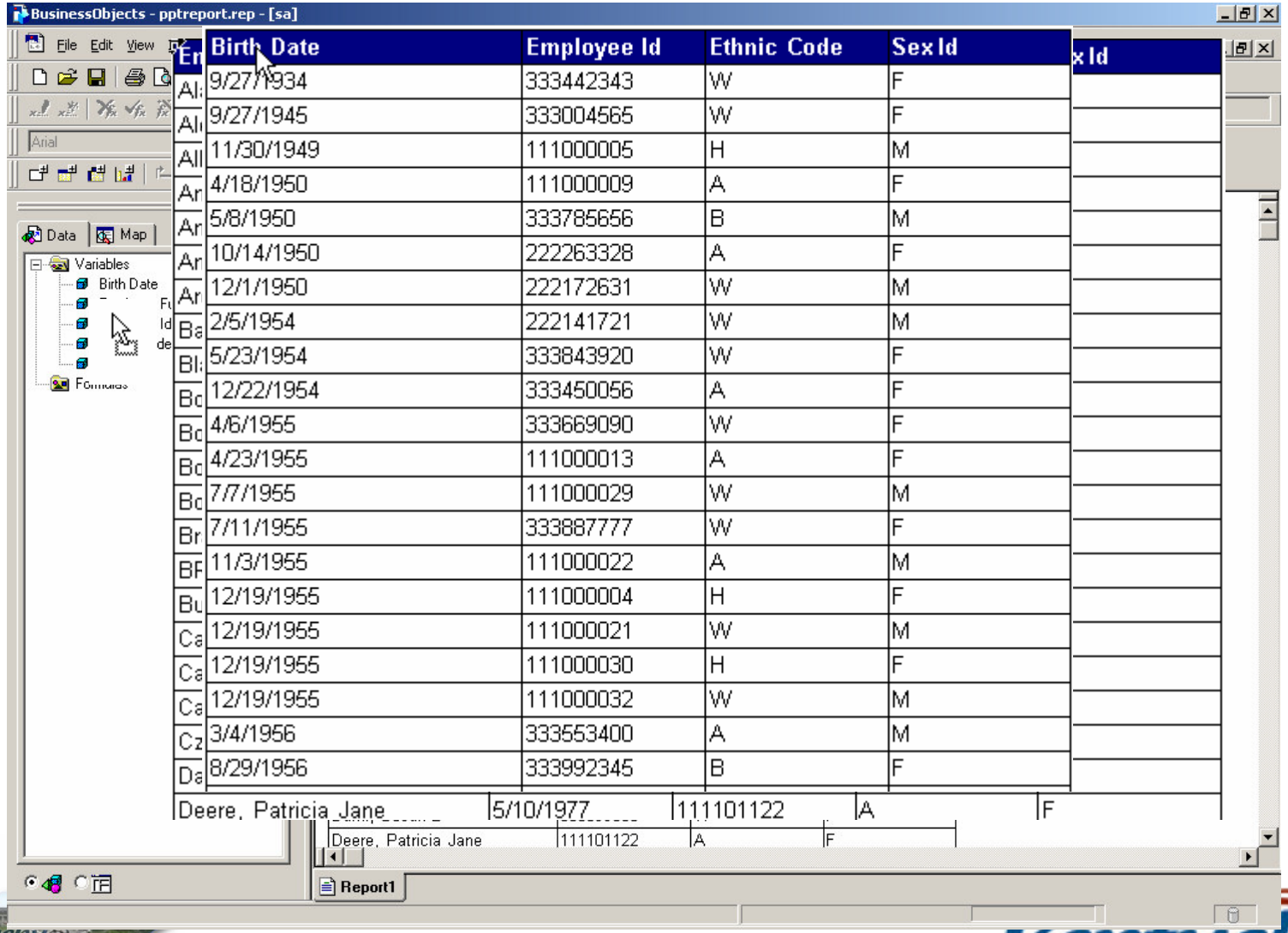


Anderson, Debbie Sara	4/18/1950	111000009	A	F
Andrews, Christopher John		555100009		N
Anfanger, John Mark	7/7/1963	222111321	W	M
Arden, Muriel Elizabeth		555100011		N
Barasch, Matthew Daniel	12/14/1960	222223034	A	M
Black, Gary John	3/19/1962	111252838	W	M
Boughton, Jan G	4/8/1978	333769009	W	F
Boughton, Jan Joyce	4/3/1966	111000015	B	M
Bowen, Beverly Ann	4/30/1965	111000014	W	F
Boyer, Kristine D	2/23/1972	333112222	W	F
Brady, Mike V	6/13/1965	333564512	W	M
BRINKMAN, JAMES MICHAEI		562334444		N
Burton, Stephen Jon	10/5/1960	111000007	B	M
Cahn, Steven Joseph	9/8/1977	222182548	A	M
Caligagan, Agnes P	7/11/1955	333887777	W	F
Candelaria, Jerry C	9/27/1980	333010001	A	M
Czae, Lynn D	7/21/1977	333906783	H	F
Dami, Susan B	3/4/1967	333099008	W	F
Deere, Patricia Jane	5/10/1977	111101122	A	F

Report Manager



Adding Columns



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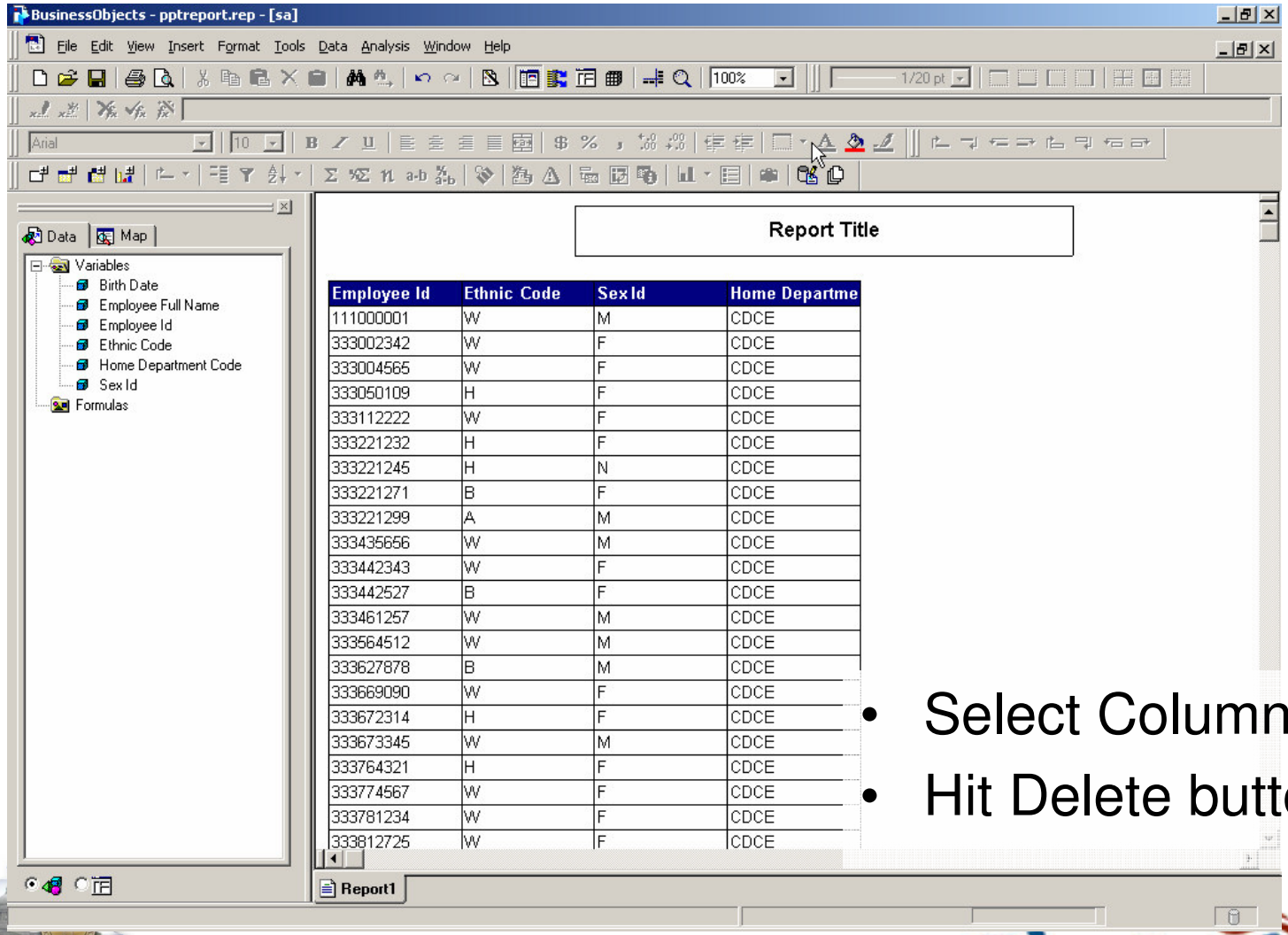
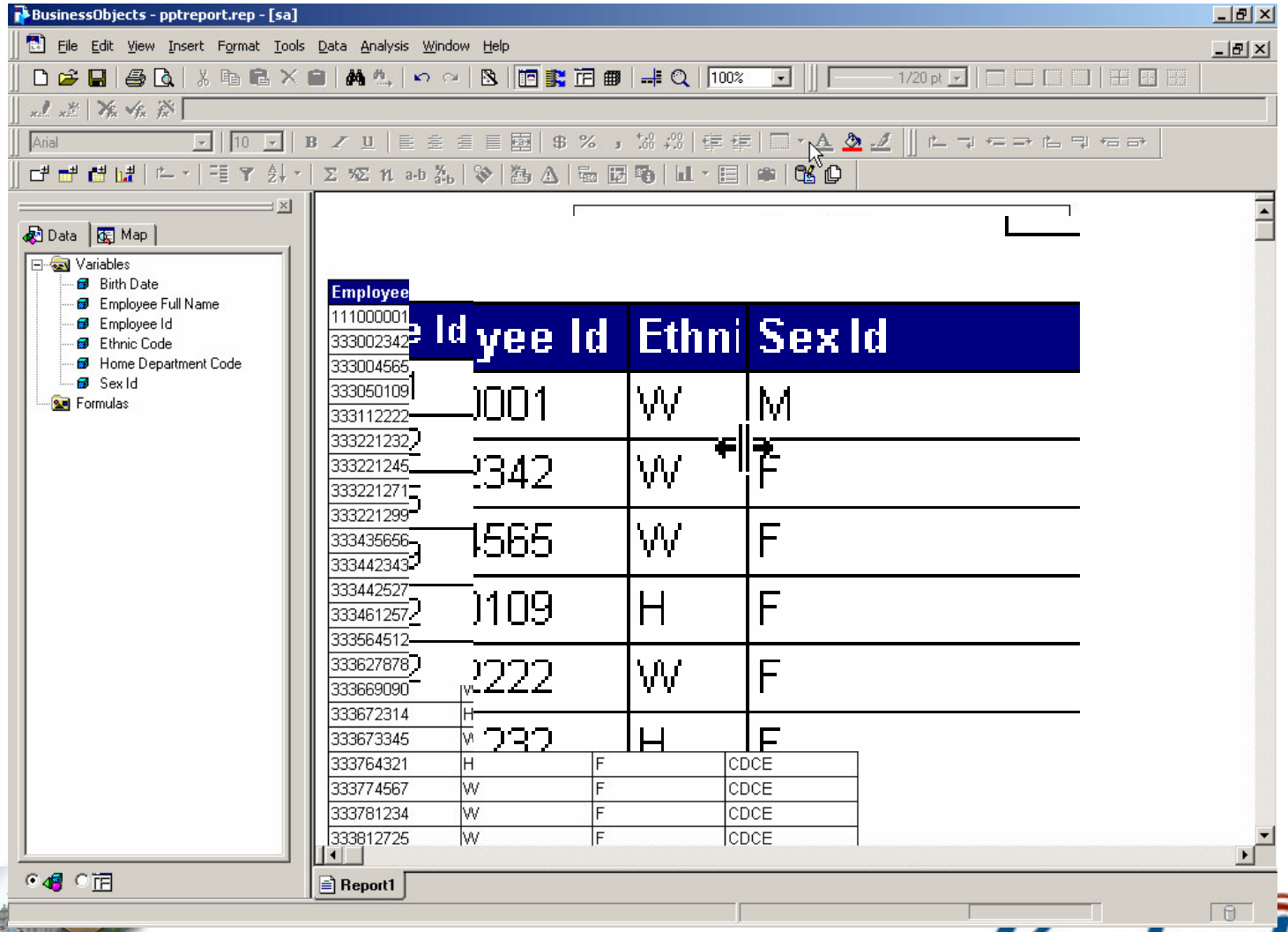
9/27/1945	333004565	W	F
11/30/1949	111000005	H	M
4/18/1950	111000009	A	F
5/8/1950	333785656	B	M
10/14/1950	222263328	A	F
12/1/1950	222172631	W	M
2/5/1954	222141721	W	M
5/23/1954	333843920	W	F
12/22/1954	333450056	A	F
4/6/1955	333669090	W	F
4/23/1955	111000013	A	F
7/7/1955	111000029	W	M
7/11/1955	333887777	W	F
11/3/1955	111000022	A	M
12/19/1955	111000004	H	F
12/19/1955	111000021	W	M
12/19/1955	111000030	H	F
12/19/1955	111000032	W	M
3/4/1956	333553400	A	M
8/29/1956	333992345	B	F
Deere, Patricia Jane	5/10/1977	111101122	A	F

Deleting Columns

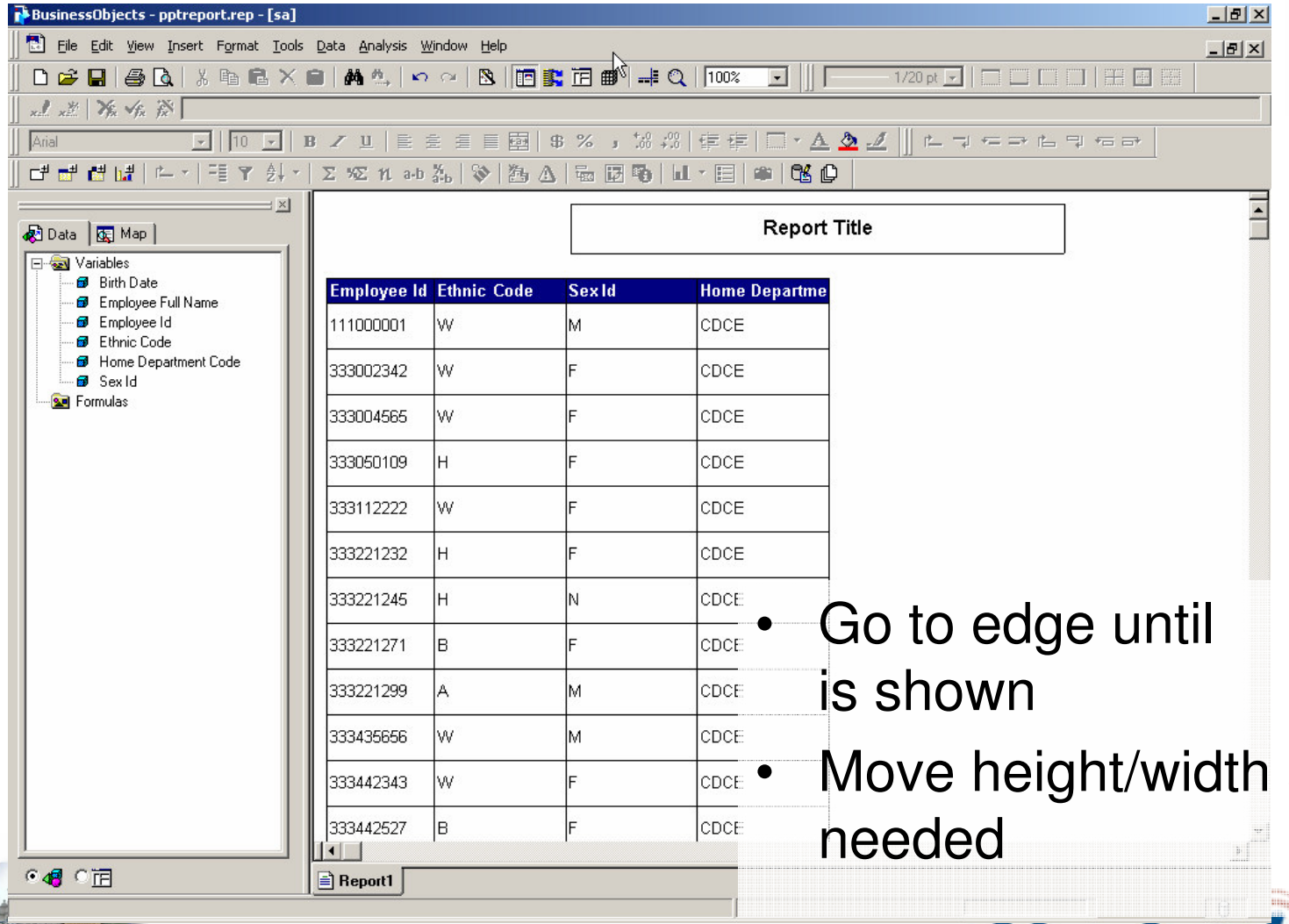


- Select Column
- Hit Delete button

Resizing Columns and Rows

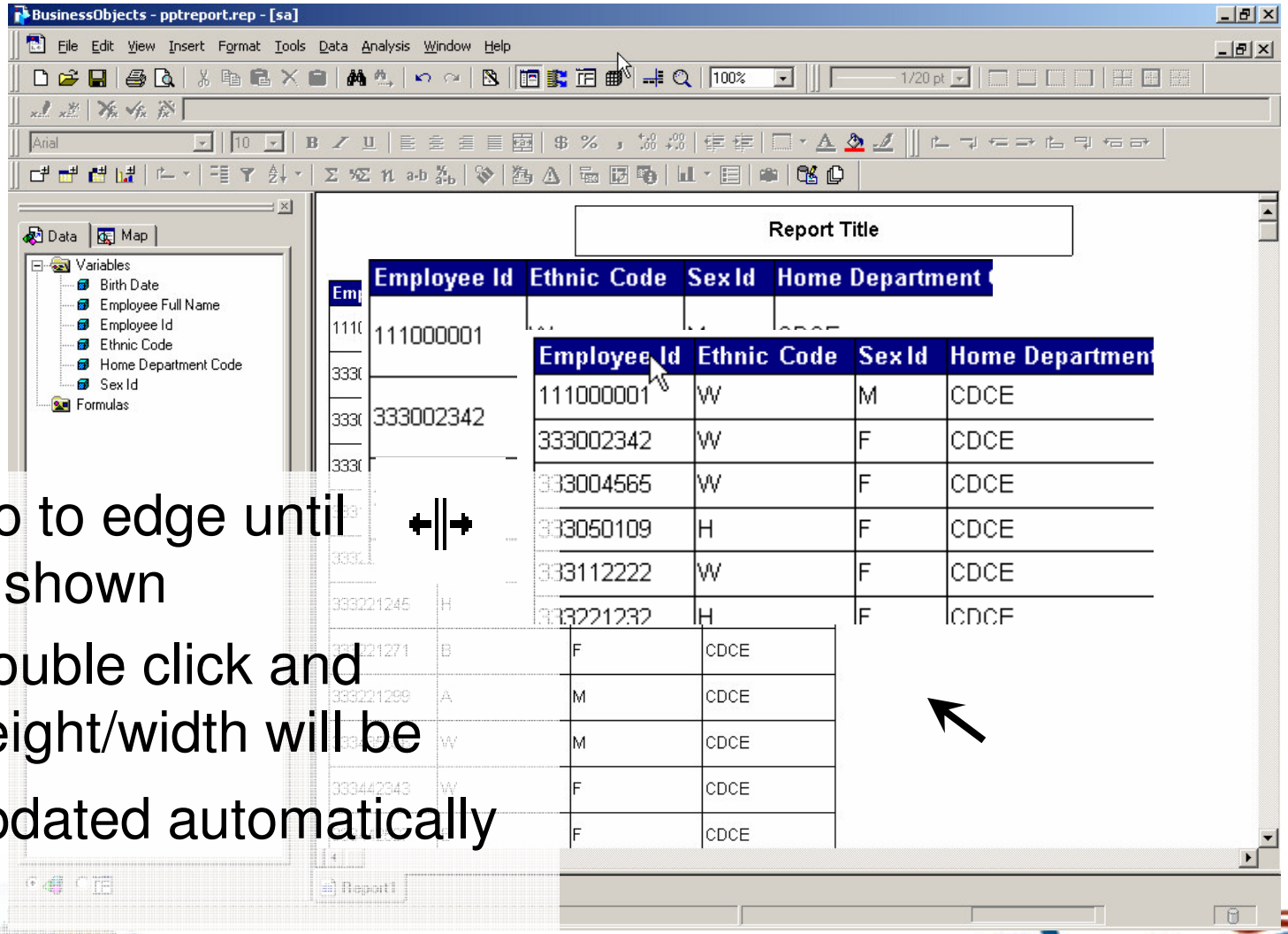


Manual Resizing Row Height



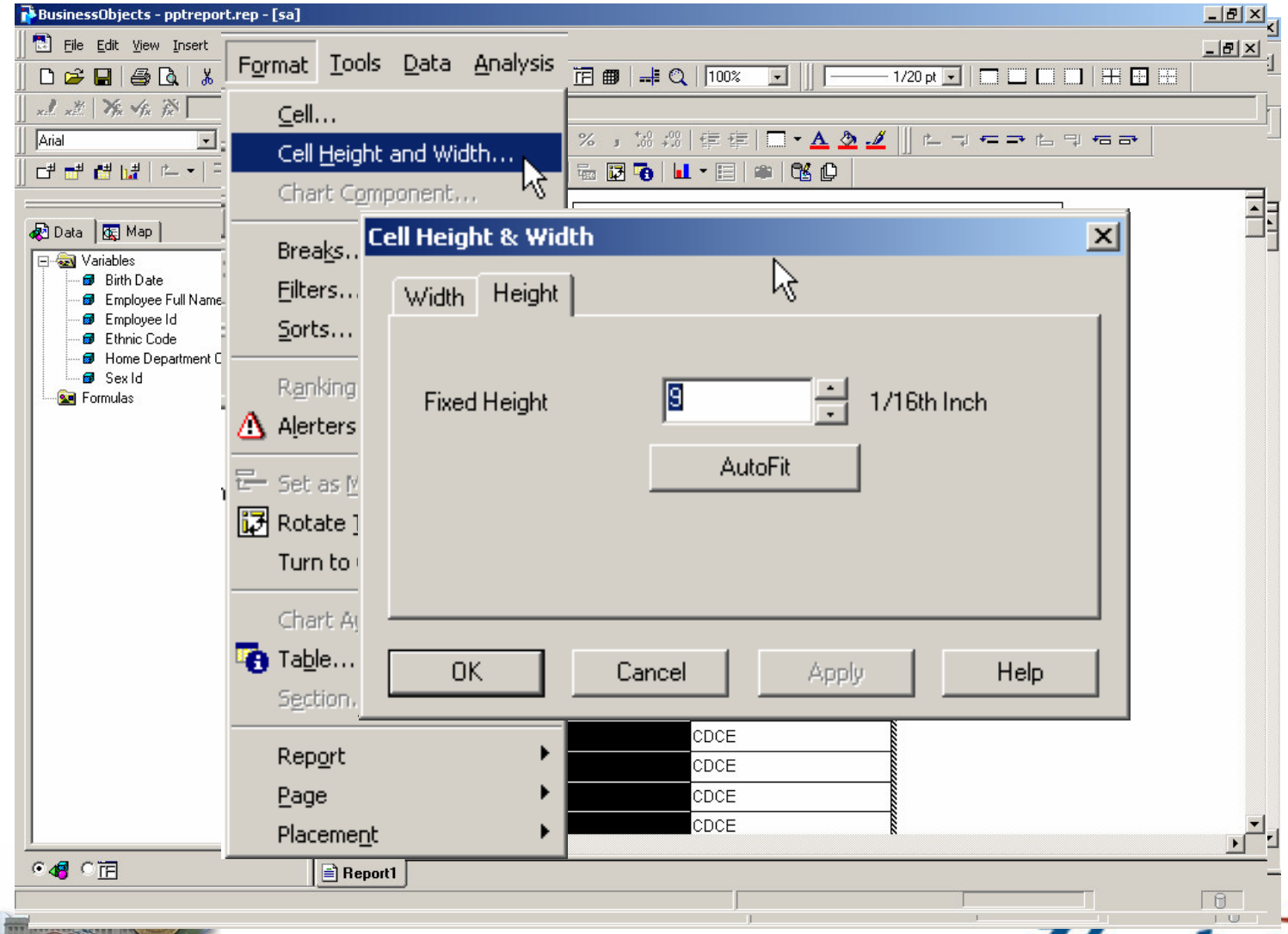
- Go to edge until ↔ is shown
- Move height/width as needed

Automatic Resizing Columns and Rows

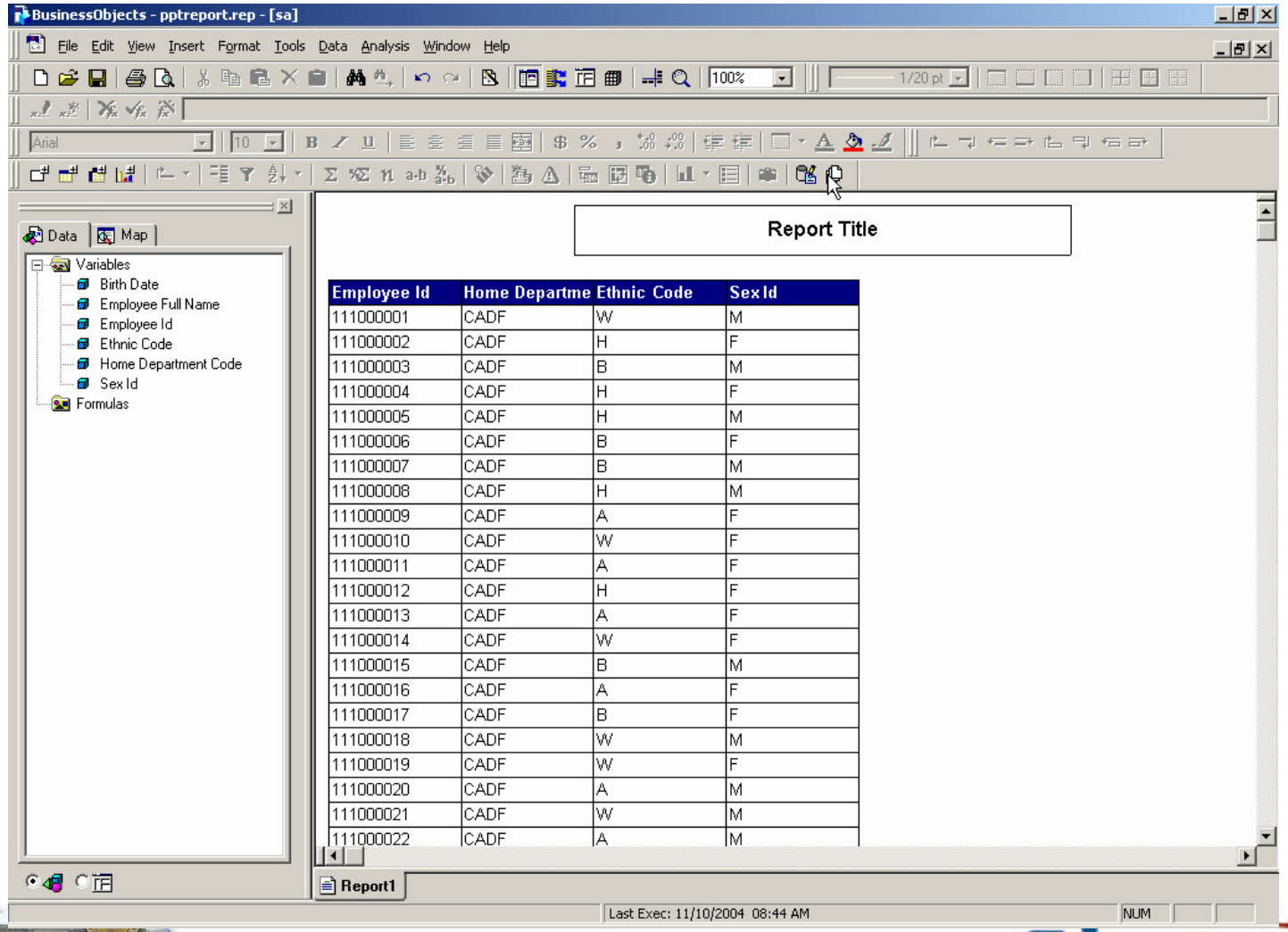


- Go to edge until ↔ is shown
- Double click and height/width will be updated automatically

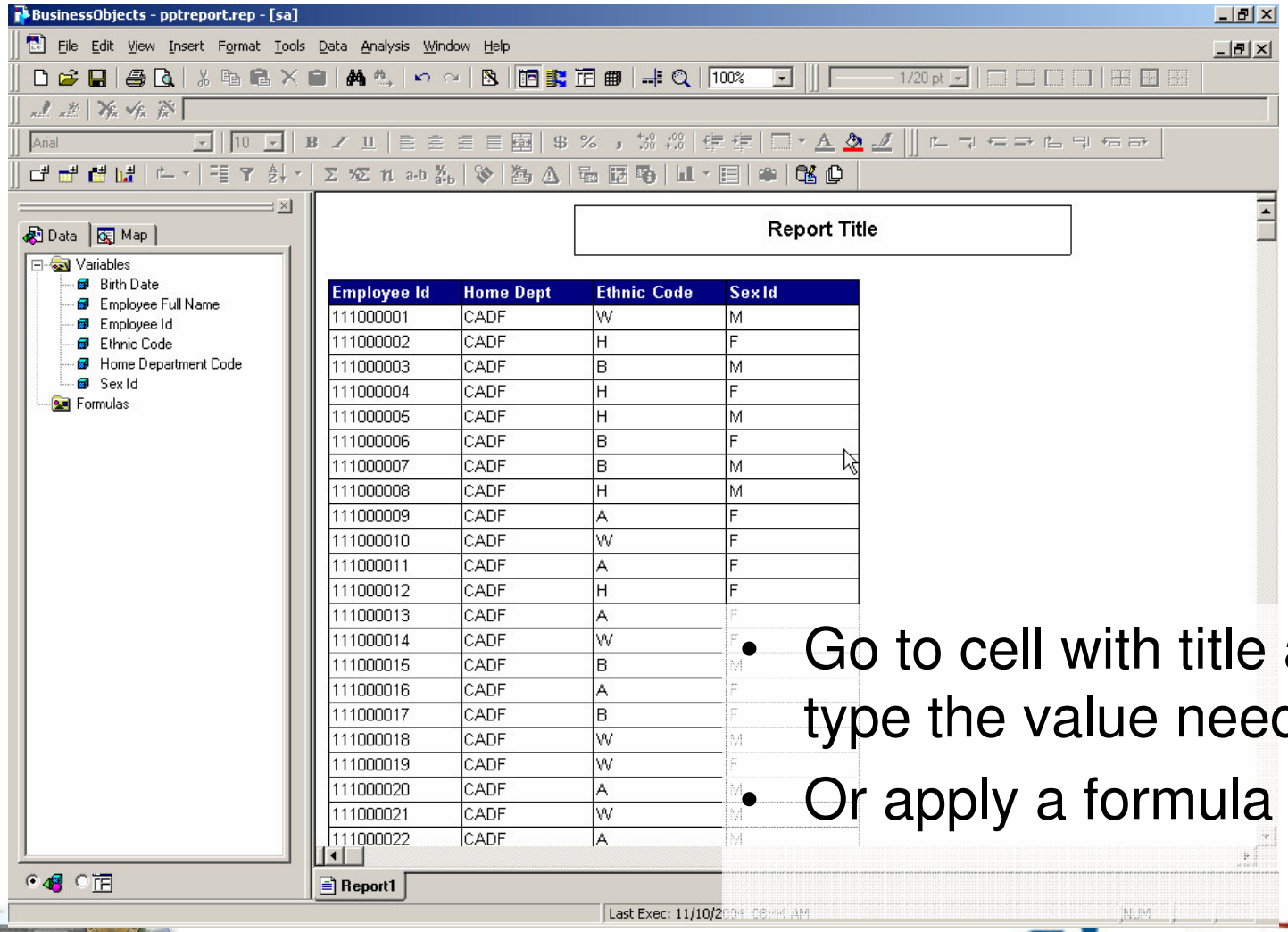
AutoFit Resizing Columns and Rows



Moving Columns

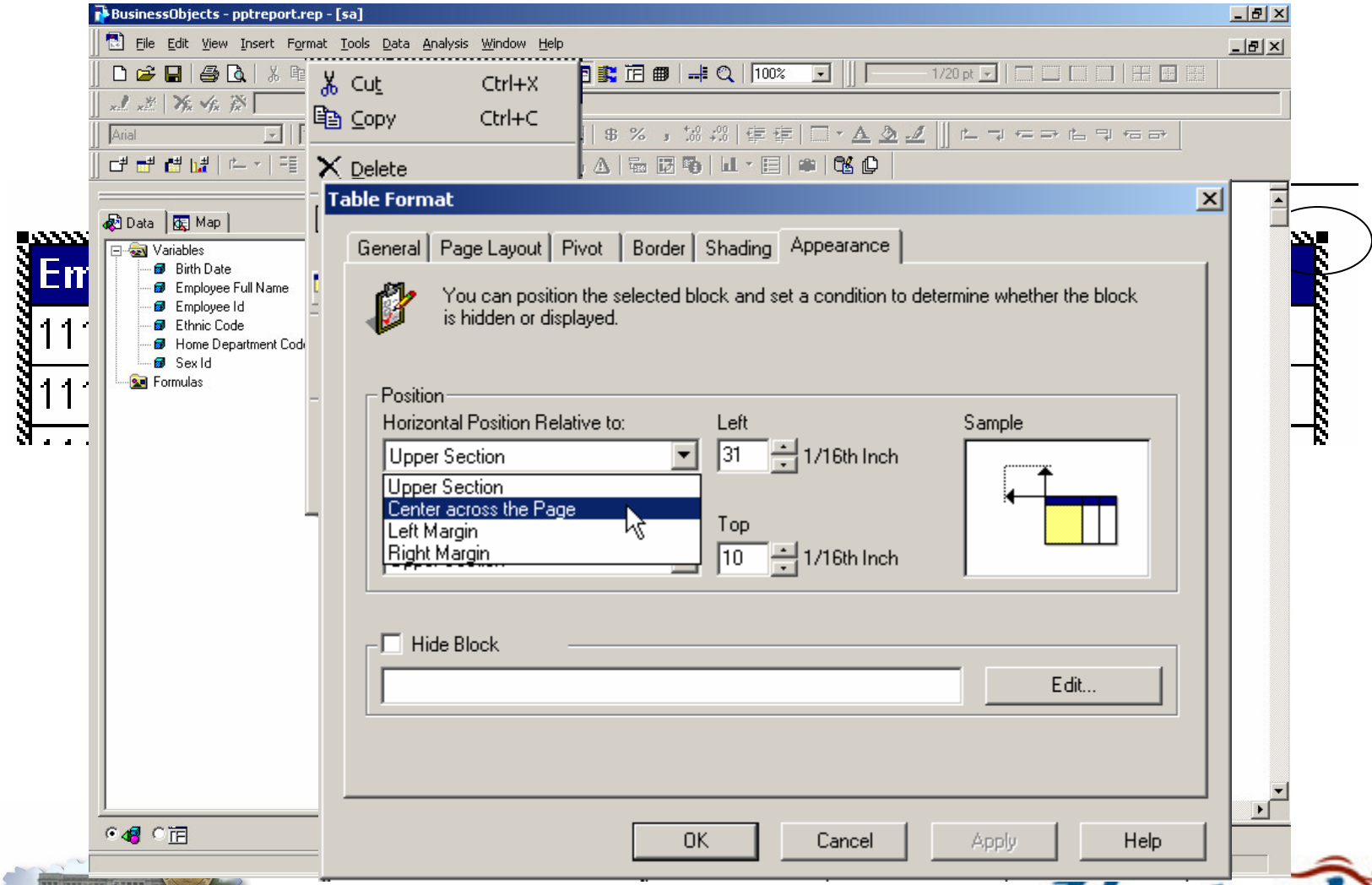


Changing Column Titles

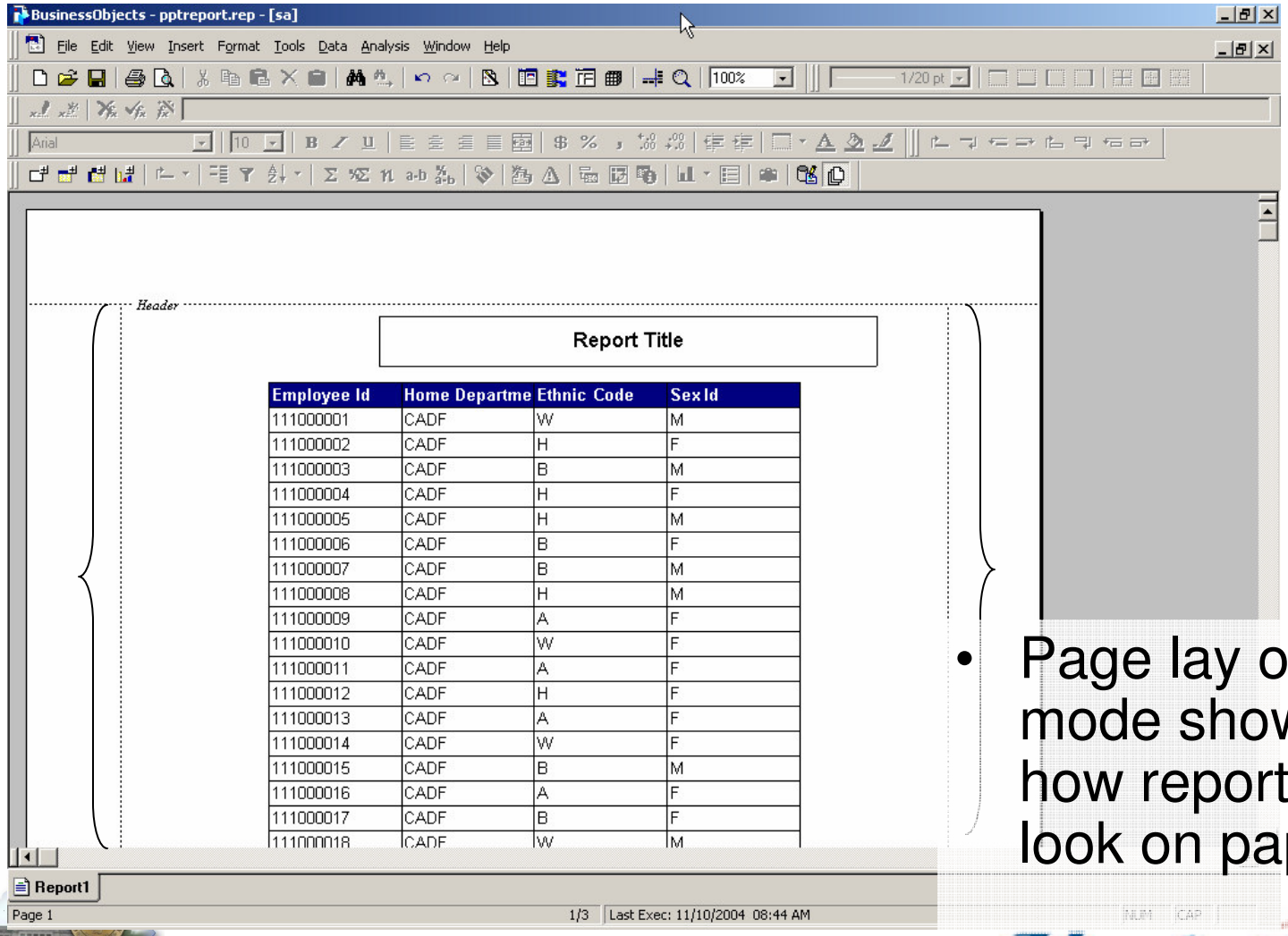


- Go to cell with title and type the value needed
- Or apply a formula

Moving Tables – Two ways



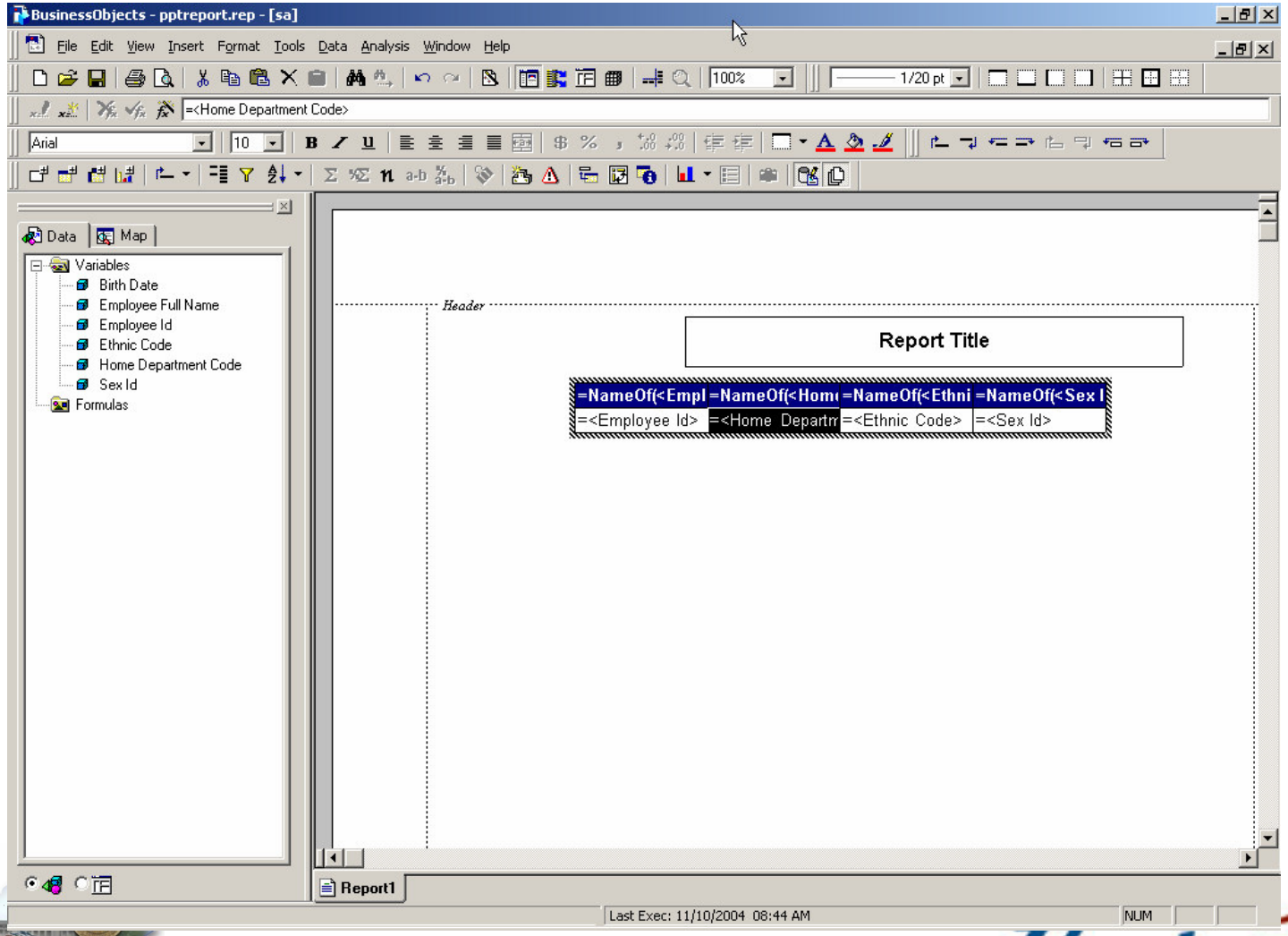
Page Layout Mode



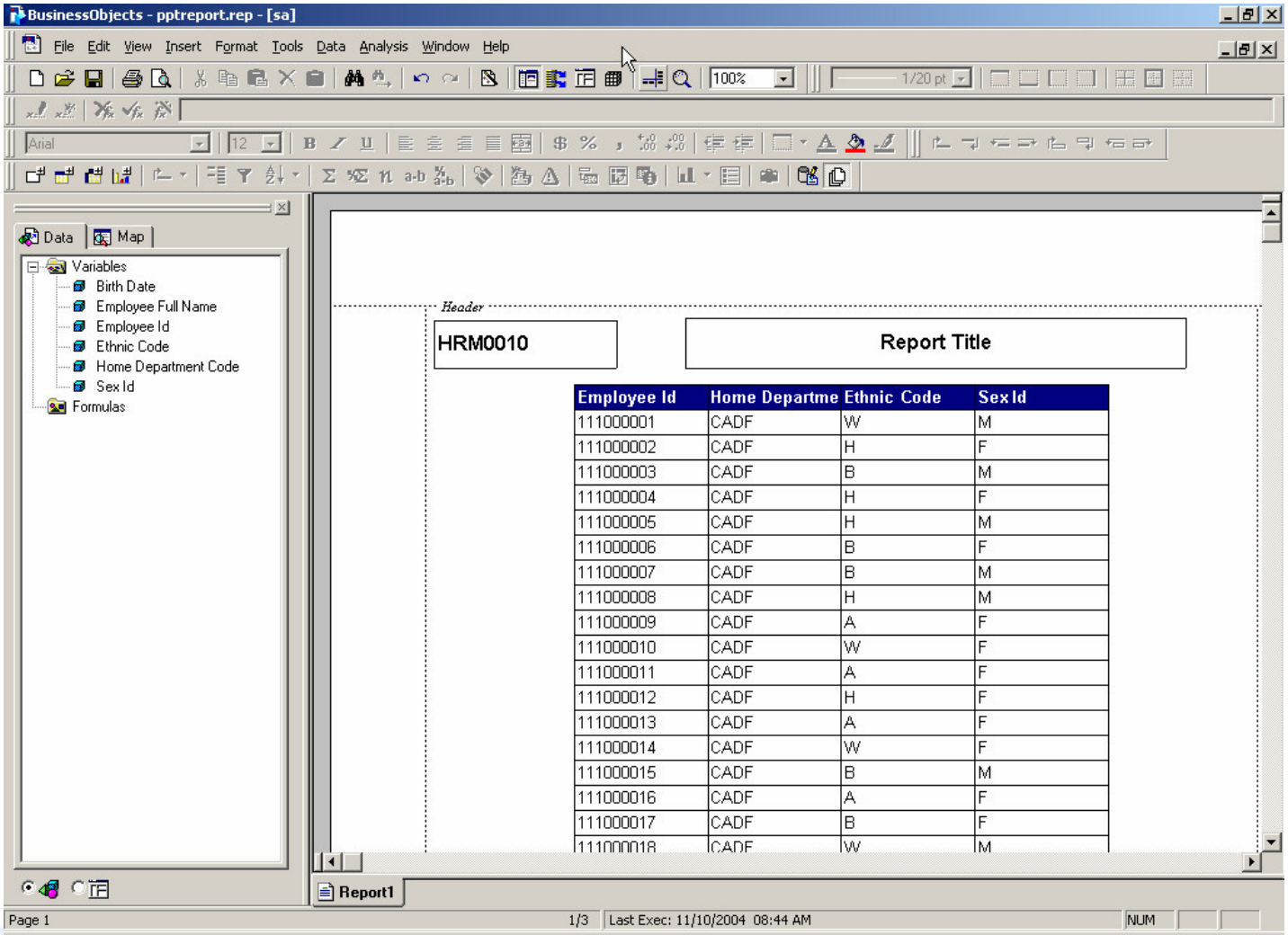
Employee Id	Home Departme	Ethnic Code	Sex Id
111000001	CADF	W	M
111000002	CADF	H	F
111000003	CADF	B	M
111000004	CADF	H	F
111000005	CADF	H	M
111000006	CADF	B	F
111000007	CADF	B	M
111000008	CADF	H	M
111000009	CADF	A	F
111000010	CADF	W	F
111000011	CADF	A	F
111000012	CADF	H	F
111000013	CADF	A	F
111000014	CADF	W	F
111000015	CADF	B	M
111000016	CADF	A	F
111000017	CADF	B	F
111000018	CADF	W	M

- Page lay out mode shows how report will look on paper

Structure Mode



Inserting Text Cells

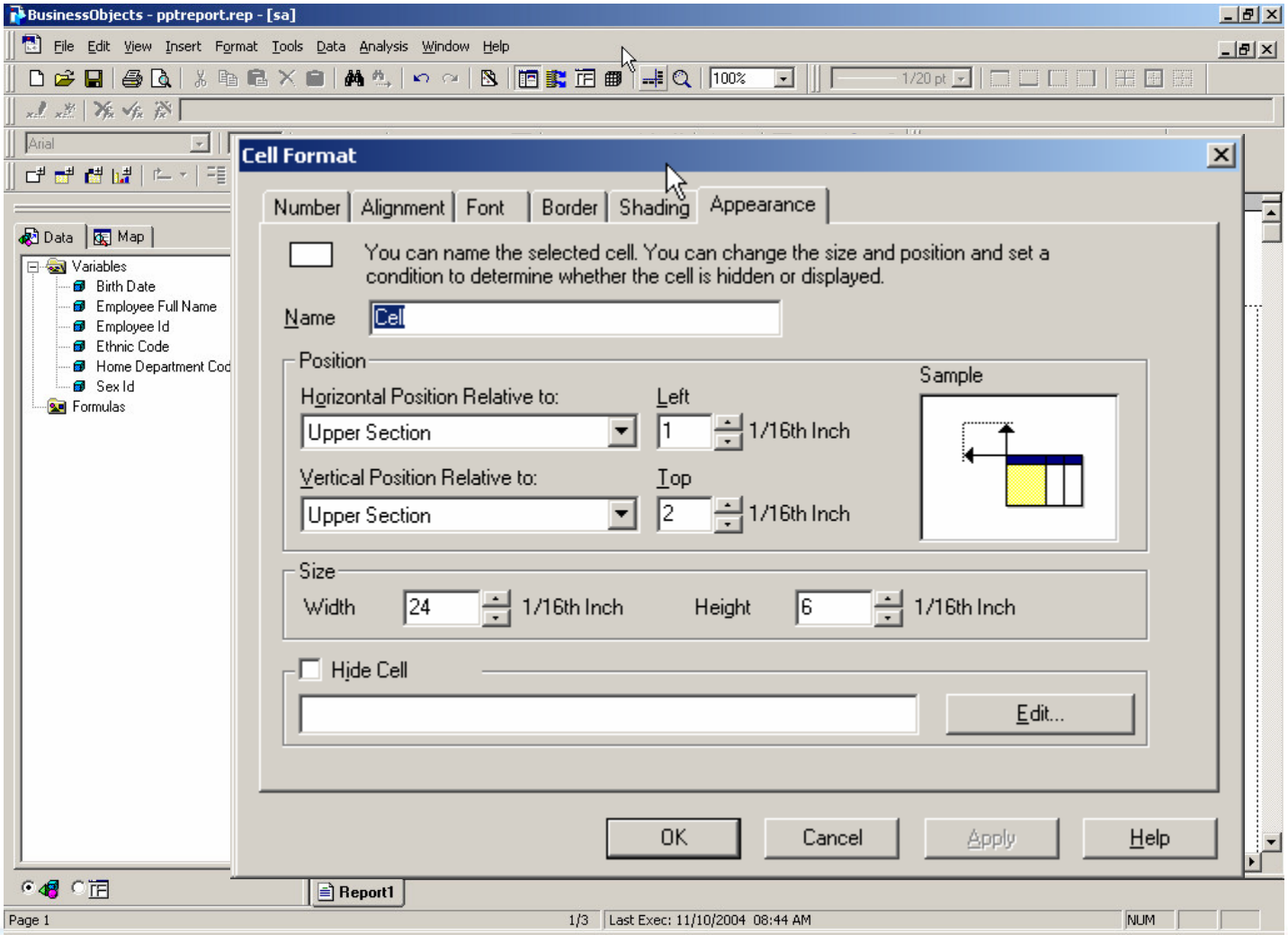


Employee Id	Home Departme	Ethnic Code	Sex Id
111000001	CADF	W	M
111000002	CADF	H	F
111000003	CADF	B	M
111000004	CADF	H	F
111000005	CADF	H	M
111000006	CADF	B	F
111000007	CADF	B	M
111000008	CADF	H	M
111000009	CADF	A	F
111000010	CADF	W	F
111000011	CADF	A	F
111000012	CADF	H	F
111000013	CADF	A	F
111000014	CADF	W	F
111000015	CADF	B	M
111000016	CADF	A	F
111000017	CADF	B	F
111000018	CADF	W	M

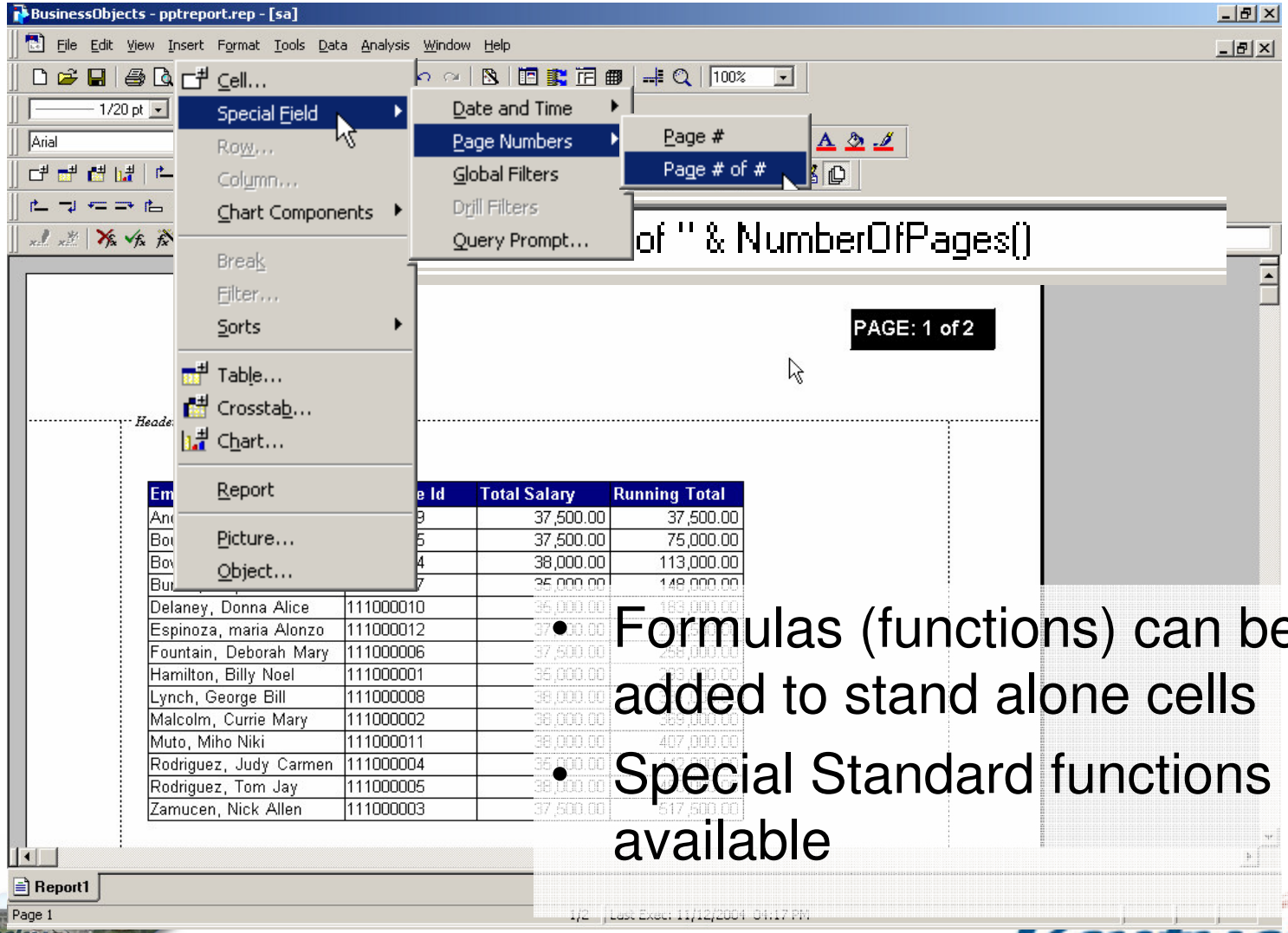
Formatting Cells

- Cells can be formatted like in any other Microsoft program
- Modify
  - Cell height/width
  - Font
  - Number/Date etc
  - Appearance (every page, where on page)
  - Etc.

Formatting Cells

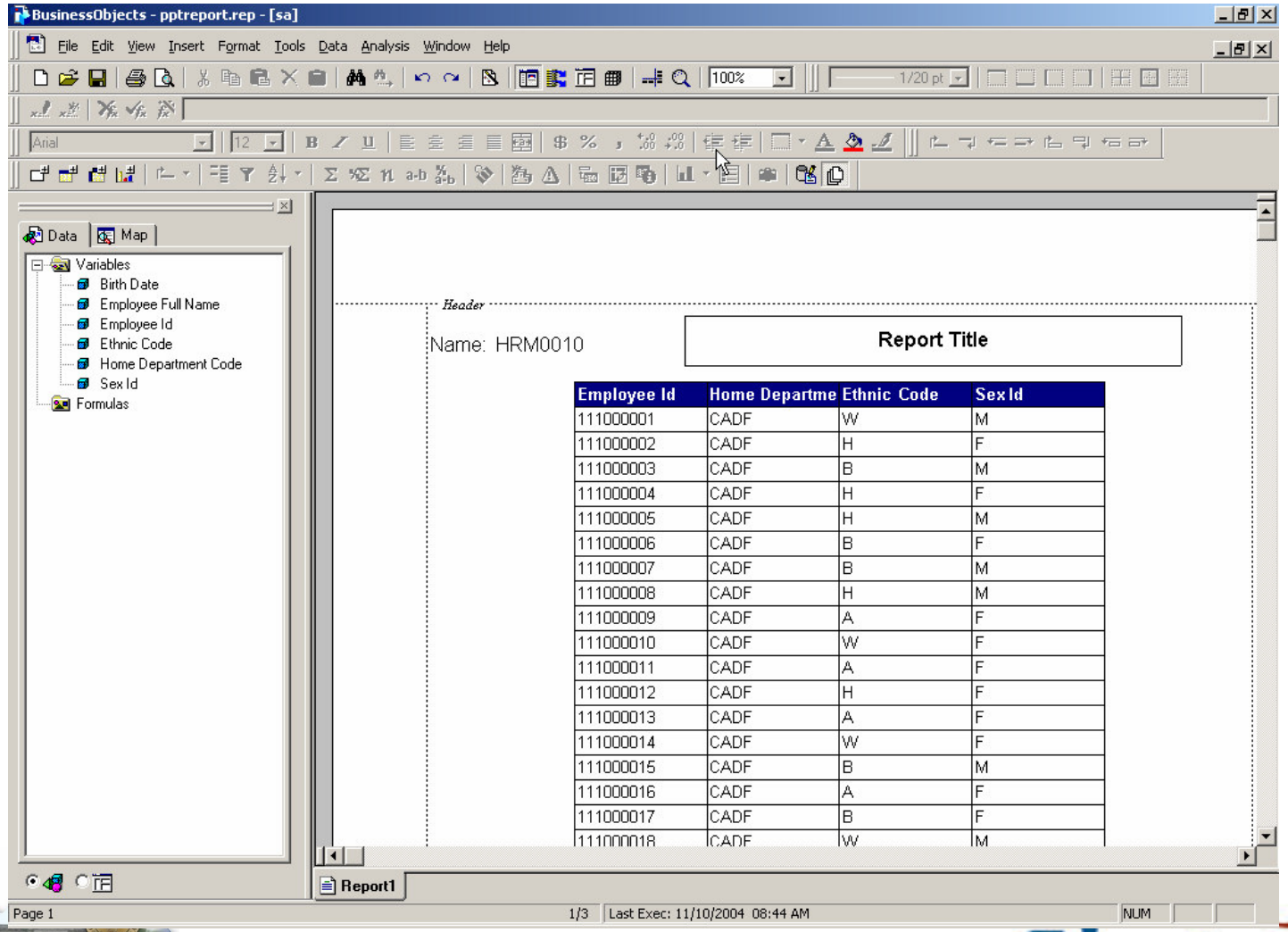


Cell Functions



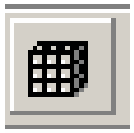
- Formulas (functions) can be added to stand alone cells
- Special Standard functions are available

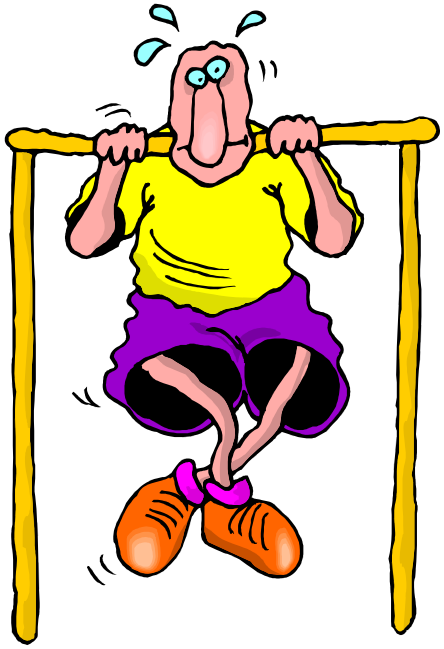
Formatting Tables



Employee Id	Home Departme	Ethnic Code	Sex Id
111000001	CADF	W	M
111000002	CADF	H	F
111000003	CADF	B	M
111000004	CADF	H	F
111000005	CADF	H	M
111000006	CADF	B	F
111000007	CADF	B	M
111000008	CADF	H	M
111000009	CADF	A	F
111000010	CADF	W	F
111000011	CADF	A	F
111000012	CADF	H	F
111000013	CADF	A	F
111000014	CADF	W	F
111000015	CADF	B	M
111000016	CADF	A	F
111000017	CADF	B	F
111000018	CADF	W	M

Workshop 3

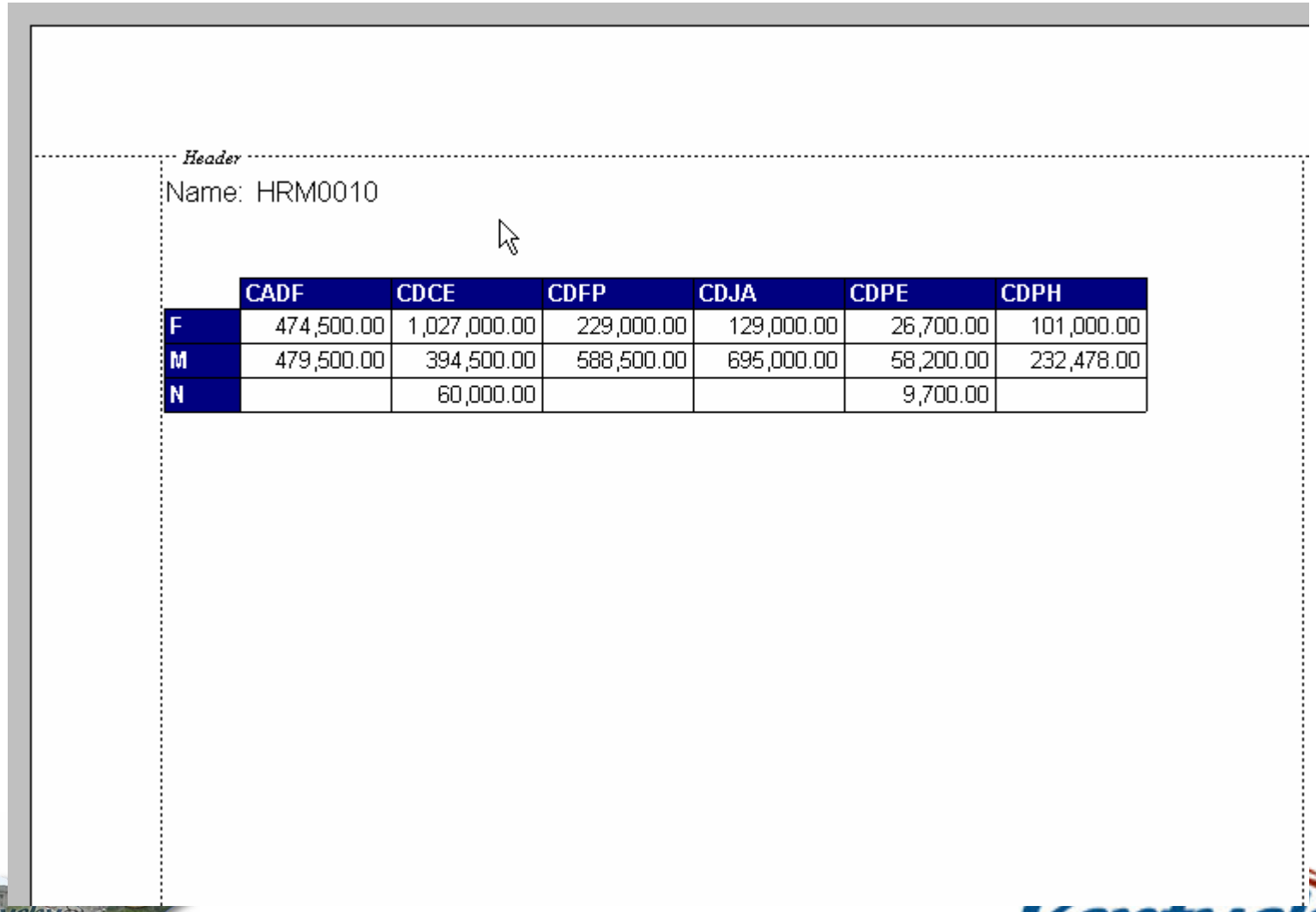
- Modify the existing report layout
- Change appearance
  - Resize columns
  - Add sorts, columns
  - Add a title
- Add cell: Last run date
  - Hints:
    - 1. Insert Blank Cell
    - 2. Get data provider name ->  (definition)
    - 3. Add formula
- Save report



Presentation Styles

- Multiple ways to display data:
  - Table
  - Chart
  - Crosstab
- Tables can be turned into charts, crosstabs into tables etc.

Block Styles

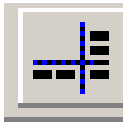


	CADF	CDCE	CDFP	CDJA	CDPE	CDPH
F	474,500.00	1,027,000.00	229,000.00	129,000.00	26,700.00	101,000.00
M	479,500.00	394,500.00	588,500.00	695,000.00	58,200.00	232,478.00
N		60,000.00			9,700.00	

Workshop 4

- Add a table to report 1 and turn that into a crosstab
- Add a table and turn that into a chart
- Format the table to include a footer with the total for Posting Amounts.
- Add a count for the Headquarters Code
- Save query/report

Slice and Dice

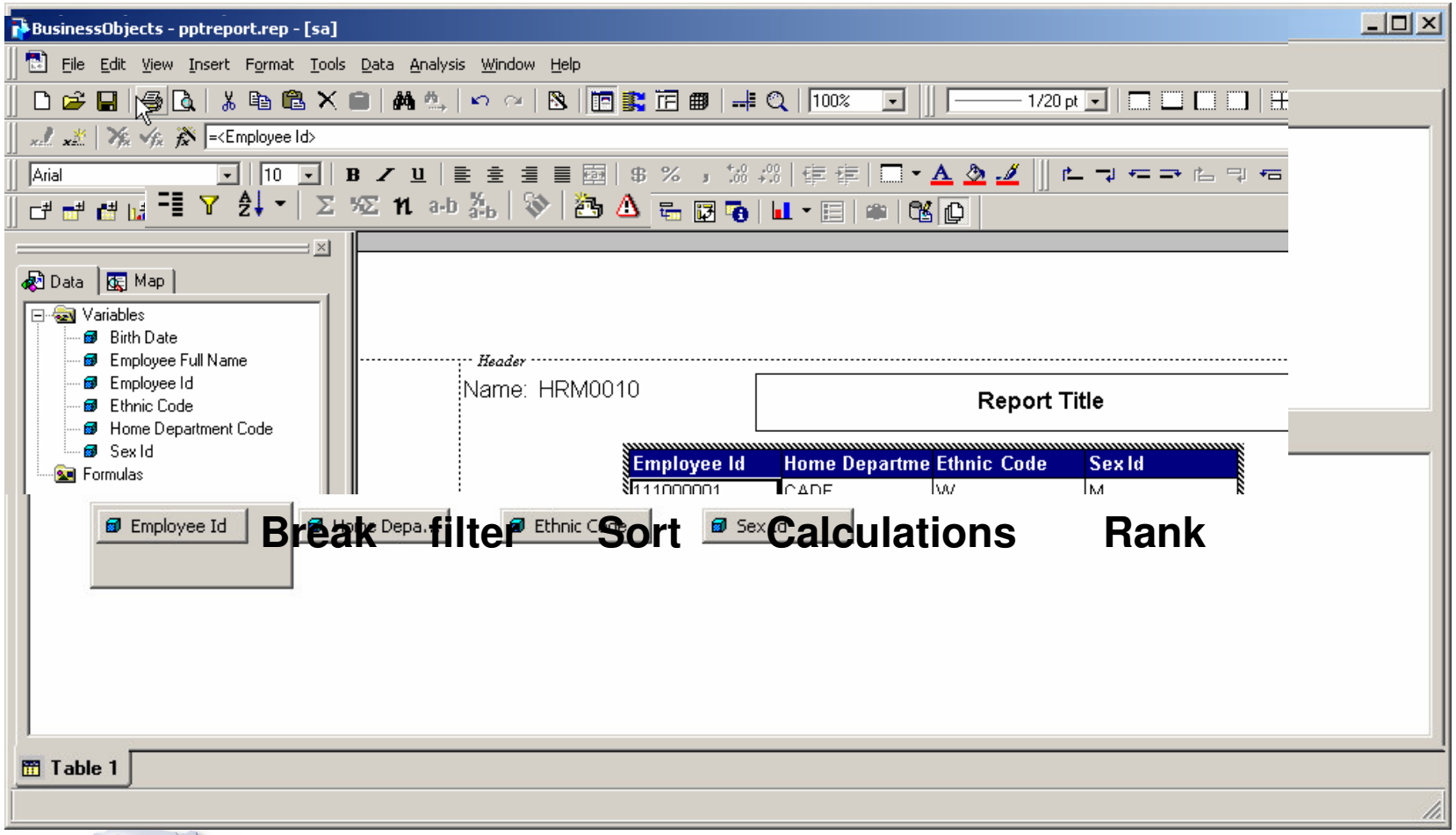
- Slice and Dice: 
  - Allows to switch data in report
  - Allows to add/remove breaks, calculations

» View sections

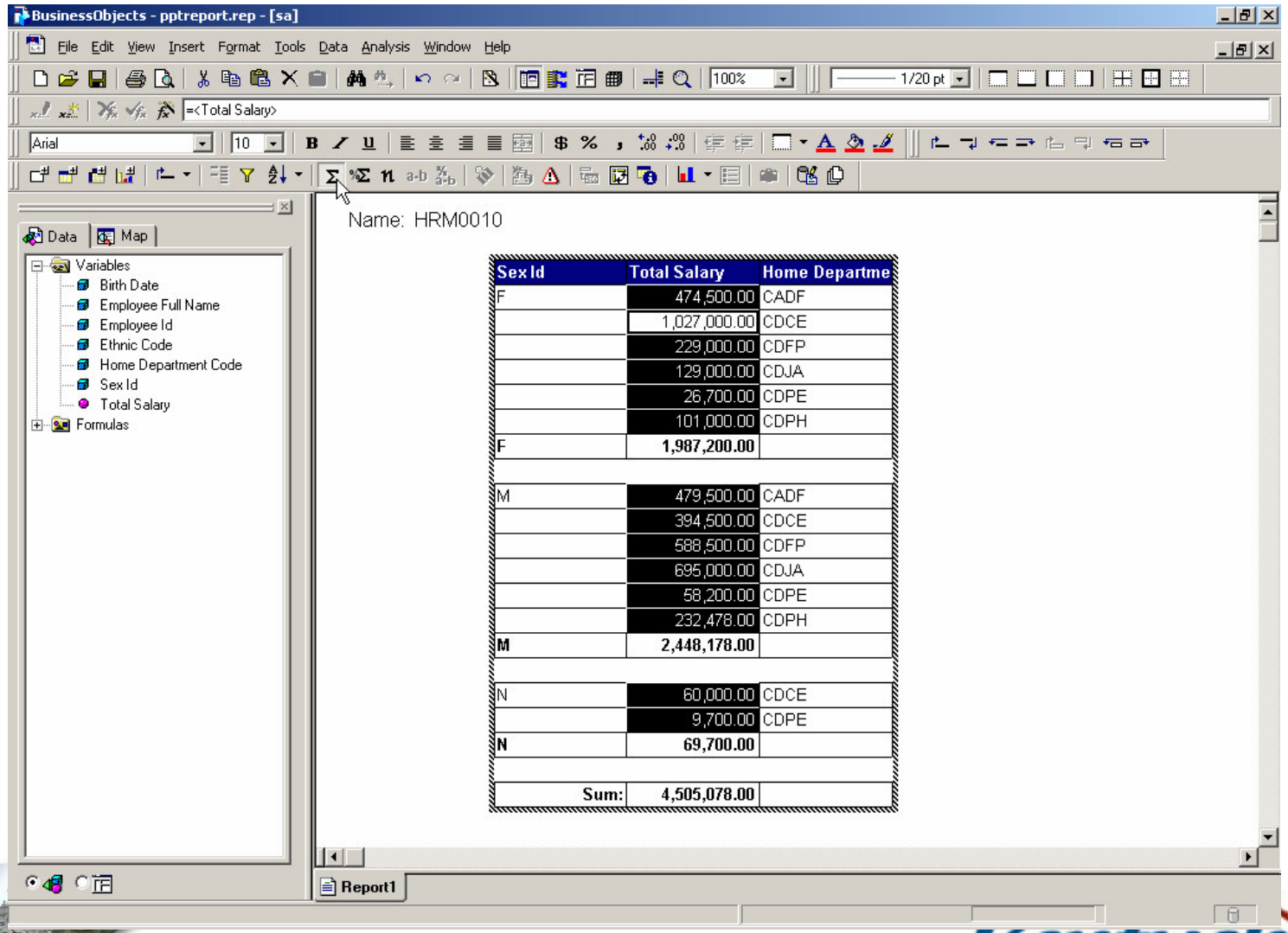
Applying breaks and sections

- Break:
  - Breaks up data in a table or crosstab according to values
  - Within a table ! Table remains 1 piece
- Section:
  - Actually breaks up the table. Although table is still considered one entity, actions can be preformed on section areas
  - Sections can be seen through ‘Structure View’
  - Tables/Charts can be added per section

Using Slice and Dice

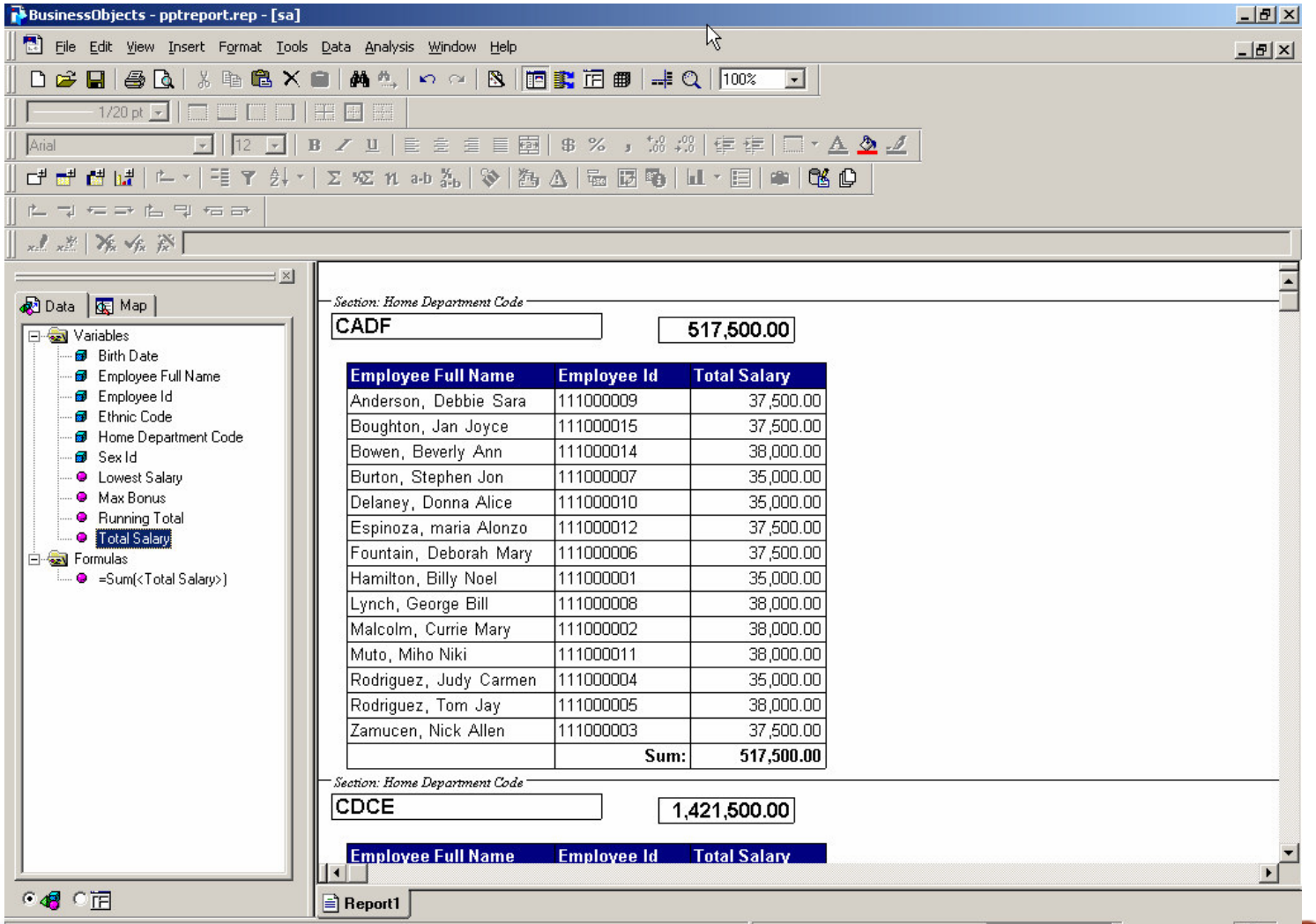


Applying Breaks

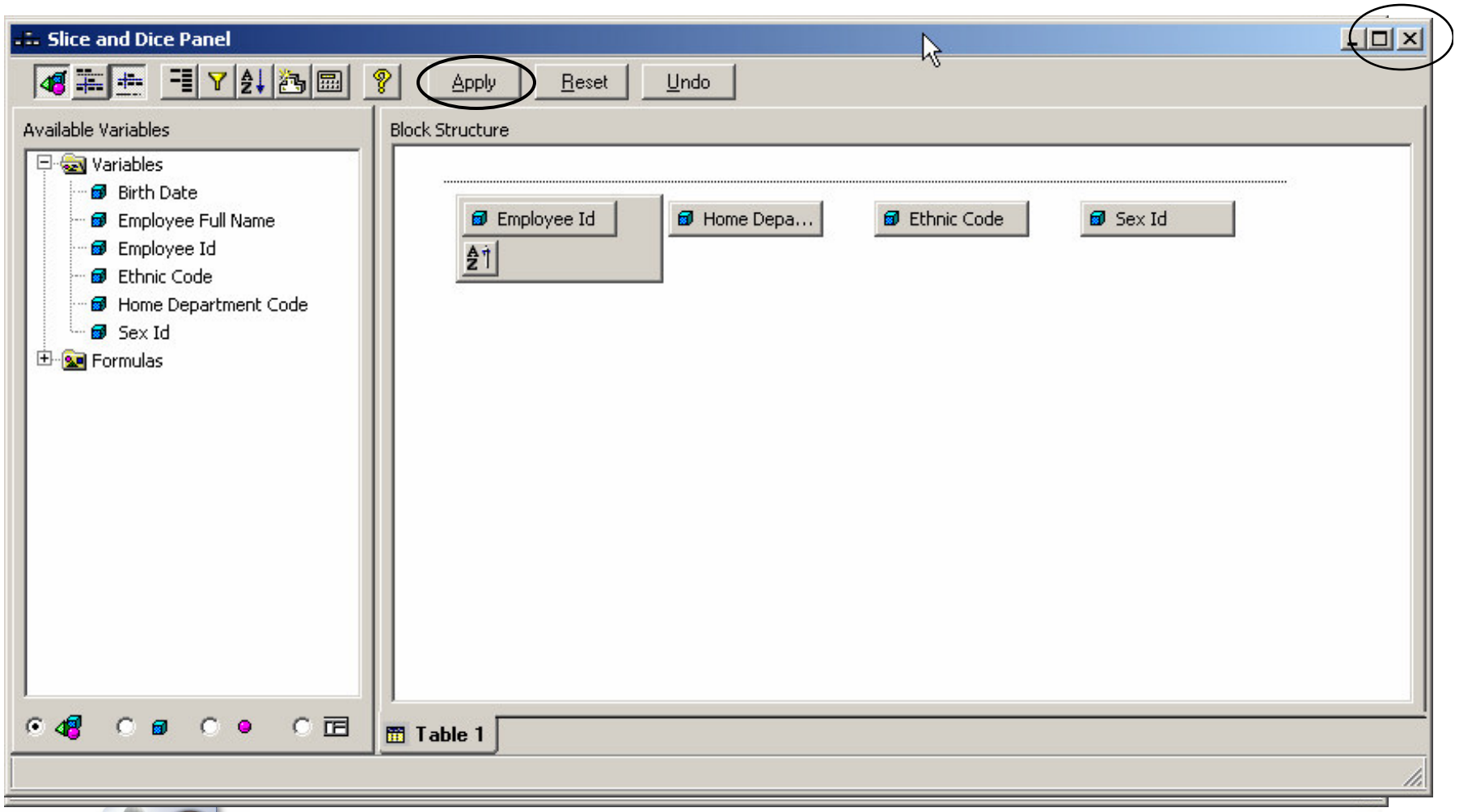


Sex Id	Total Salary	Home Departme
F	474,500.00	CADF
	1,027,000.00	CDCE
	229,000.00	CDFP
	129,000.00	CDJA
	26,700.00	CDPE
	101,000.00	CDPH
F	**1,987,200.00**	
M	479,500.00	CADF
	394,500.00	CDCE
	588,500.00	CDFP
	695,000.00	CDJA
	58,200.00	CDPE
	232,478.00	CDPH
M	**2,448,178.00**	
N	60,000.00	CDCE
	9,700.00	CDPE
N	**69,700.00**	
Sum:	**4,505,078.00**	

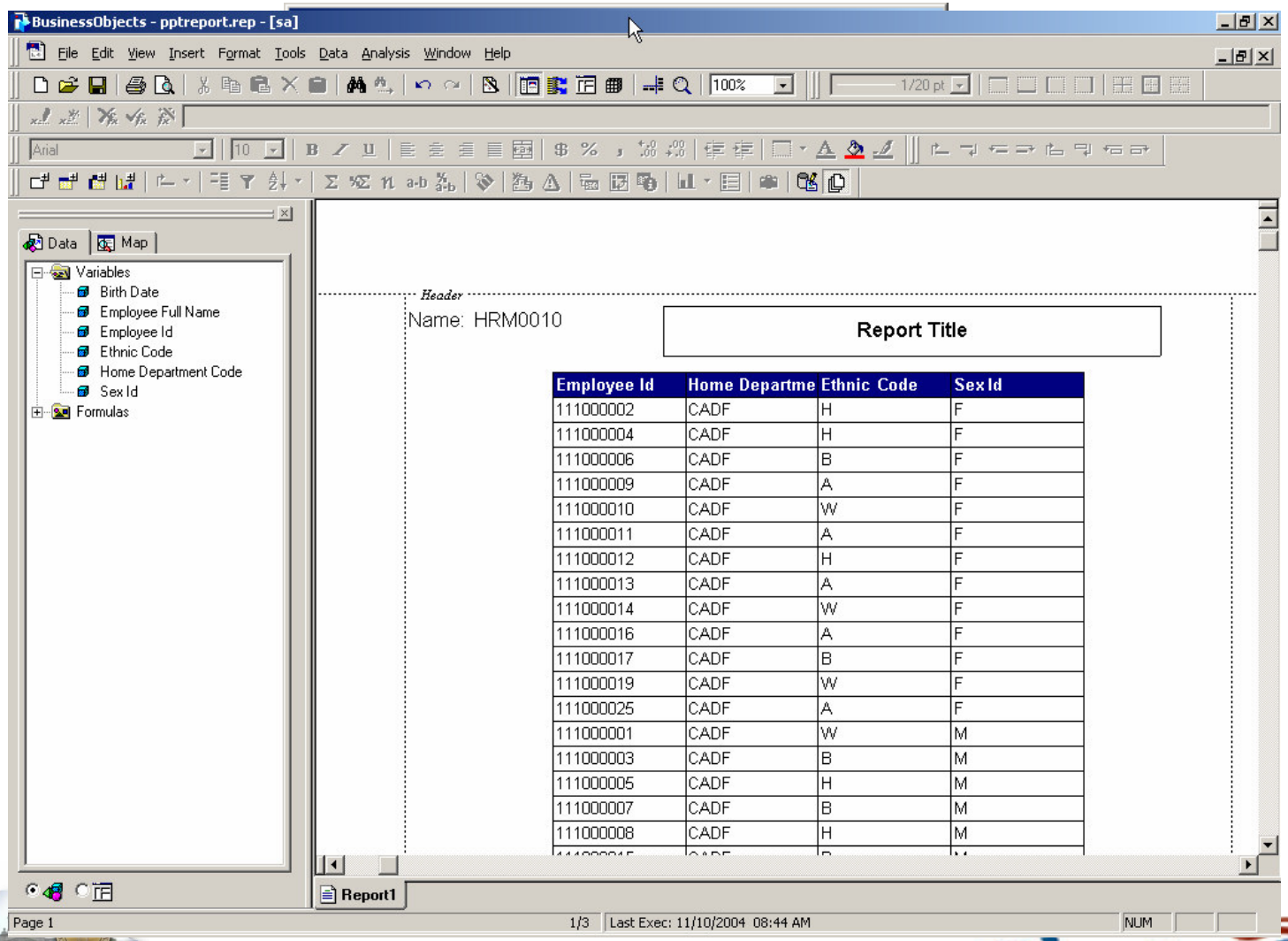
Sectioning


BusinessObjects - pptreport.rep - [sa]
File Edit View Insert Format Tools Data Analysis Window Help
Data
Map
Variables
Birth Date
Employee Full Name
Employee Id
Ethnic Code
Home Department Code
Sex Id
Lowest Salary
Max Bonus
Running Total
Total Salary
Formulas
=Sum(<Total Salary>)
Section: Home Department Code
CADF
517,500.00
Employee Full Name | Employee Id | Total Salary
Anderson, Debbie Sara | 111000009 | 37,500.00
Boughton, Jan Joyce | 111000015 | 37,500.00
Bowen, Beverly Ann | 111000014 | 38,000.00
Burton, Stephen Jon | 111000007 | 35,000.00
Delaney, Donna Alice | 111000010 | 35,000.00
Espinoza, maria Alonzo | 111000012 | 37,500.00
Fountain, Deborah Mary | 111000006 | 37,500.00
Hamilton, Billy Noel | 111000001 | 35,000.00
Lynch, George Bill | 111000008 | 38,000.00
Malcolm, Currie Mary | 111000002 | 38,000.00
Muto, Miho Niki | 111000011 | 38,000.00
Rodriguez, Judy Carmen | 111000004 | 35,000.00
Rodriguez, Tom Jay | 111000005 | 38,000.00
Zamucen, Nick Allen | 111000003 | 37,500.00
Sum: 517,500.00
Section: Home Department Code
CDCE
1,421,500.00
Employee Full Name | Employee Id | Total Salary
Report1

Sorting Data

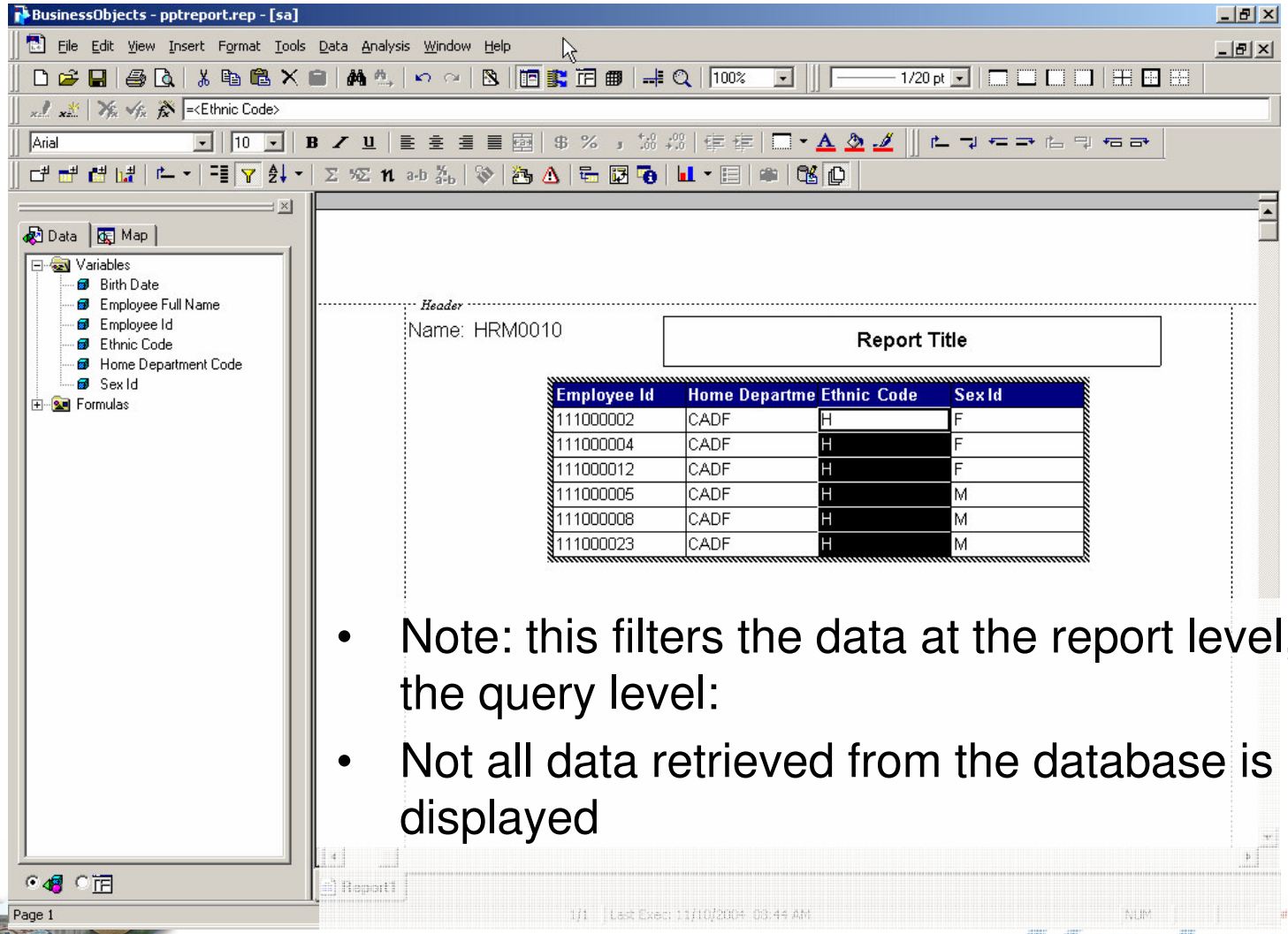


Managing Sorts



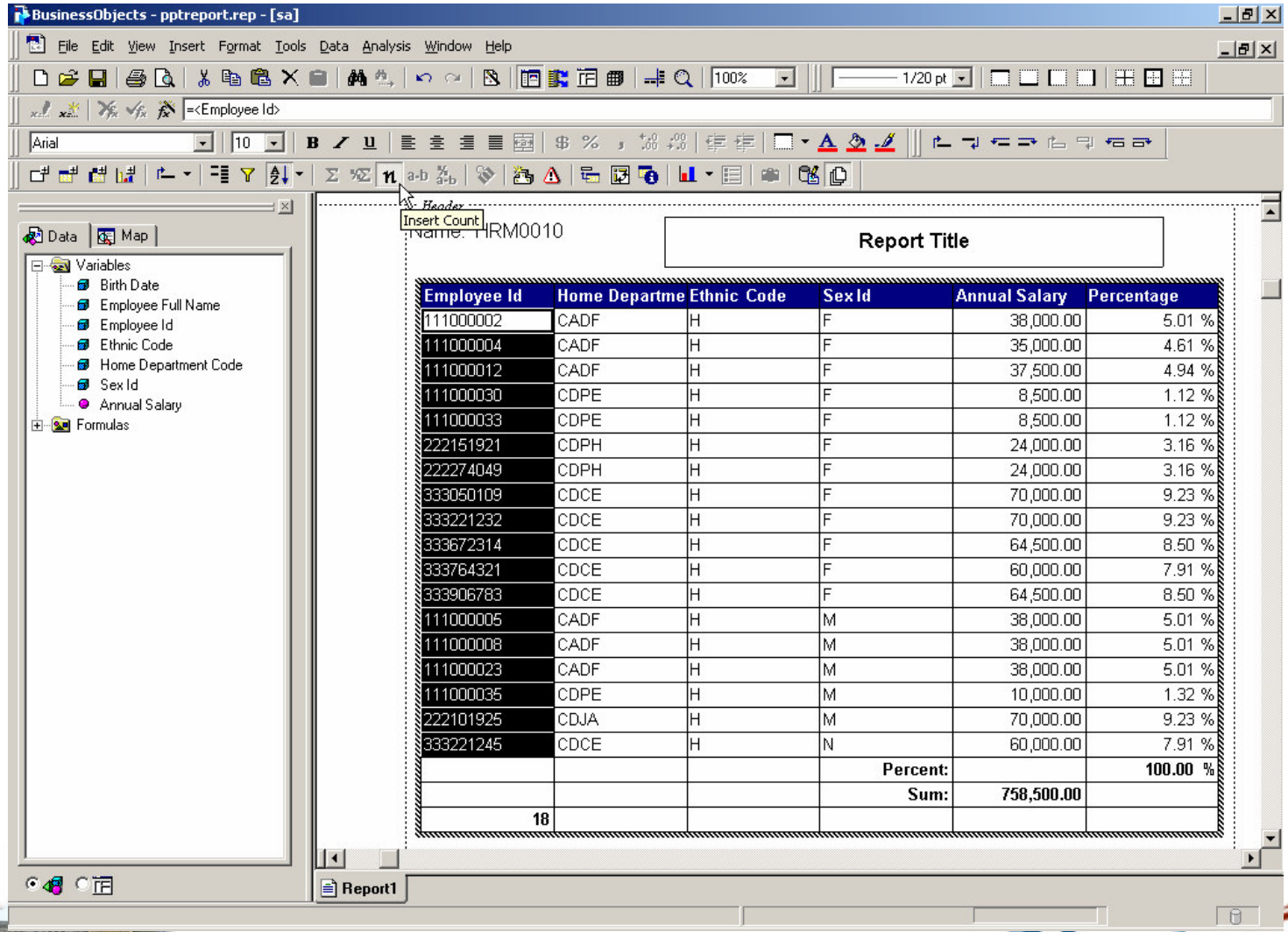
Employee Id	Home Departme	Ethnic Code	Sex Id
111000002	CADF	H	F
111000004	CADF	H	F
111000006	CADF	B	F
111000009	CADF	A	F
111000010	CADF	W	F
111000011	CADF	A	F
111000012	CADF	H	F
111000013	CADF	A	F
111000014	CADF	W	F
111000016	CADF	A	F
111000017	CADF	B	F
111000019	CADF	W	F
111000025	CADF	A	F
111000001	CADF	W	M
111000003	CADF	B	M
111000005	CADF	H	M
111000007	CADF	B	M
111000008	CADF	H	M

Filtering Data



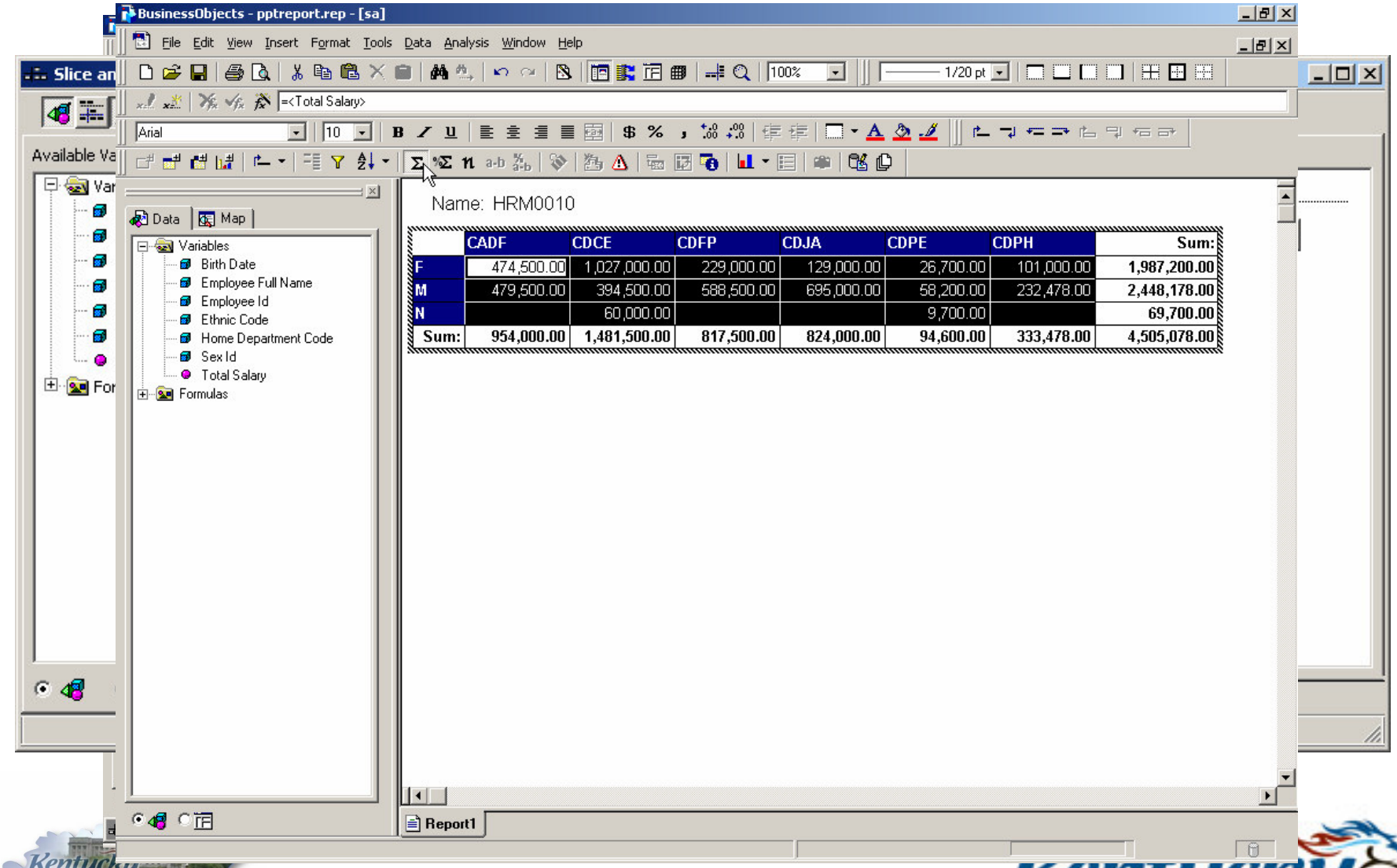
- Note: this filters the data at the report level, not at the query level:
- Not all data retrieved from the database is displayed

Applying Calculations



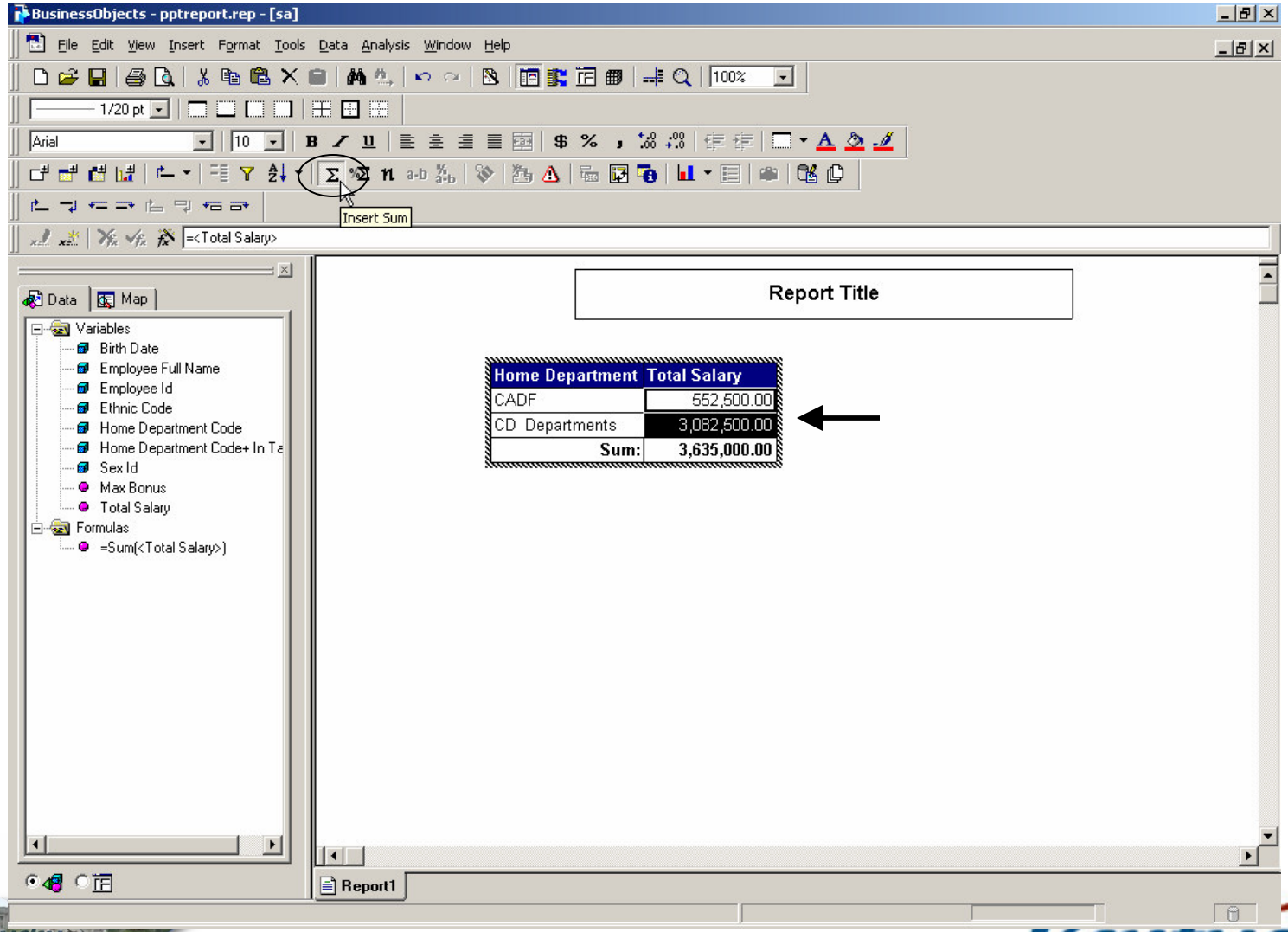
Employee Id	Home Departme	Ethnic Code	Sex Id	Annual Salary	Percentage
111000002	CADF	H	F	38,000.00	5.01 %
111000004	CADF	H	F	35,000.00	4.61 %
111000012	CADF	H	F	37,500.00	4.94 %
111000030	CDPE	H	F	8,500.00	1.12 %
111000033	CDPE	H	F	8,500.00	1.12 %
222151921	CDPH	H	F	24,000.00	3.16 %
222274049	CDPH	H	F	24,000.00	3.16 %
333050109	CDCE	H	F	70,000.00	9.23 %
333221232	CDCE	H	F	70,000.00	9.23 %
333672314	CDCE	H	F	64,500.00	8.50 %
333764321	CDCE	H	F	60,000.00	7.91 %
333906783	CDCE	H	F	64,500.00	8.50 %
111000005	CADF	H	M	38,000.00	5.01 %
111000008	CADF	H	M	38,000.00	5.01 %
111000023	CADF	H	M	38,000.00	5.01 %
111000035	CDPE	H	M	10,000.00	1.32 %
222101925	CDJA	H	M	70,000.00	9.23 %
333221245	CDCE	H	N	60,000.00	7.91 %
			Percent:		100.00 %
			Sum:	758,500.00	
18					

Applying Calculation with Slice and Dice

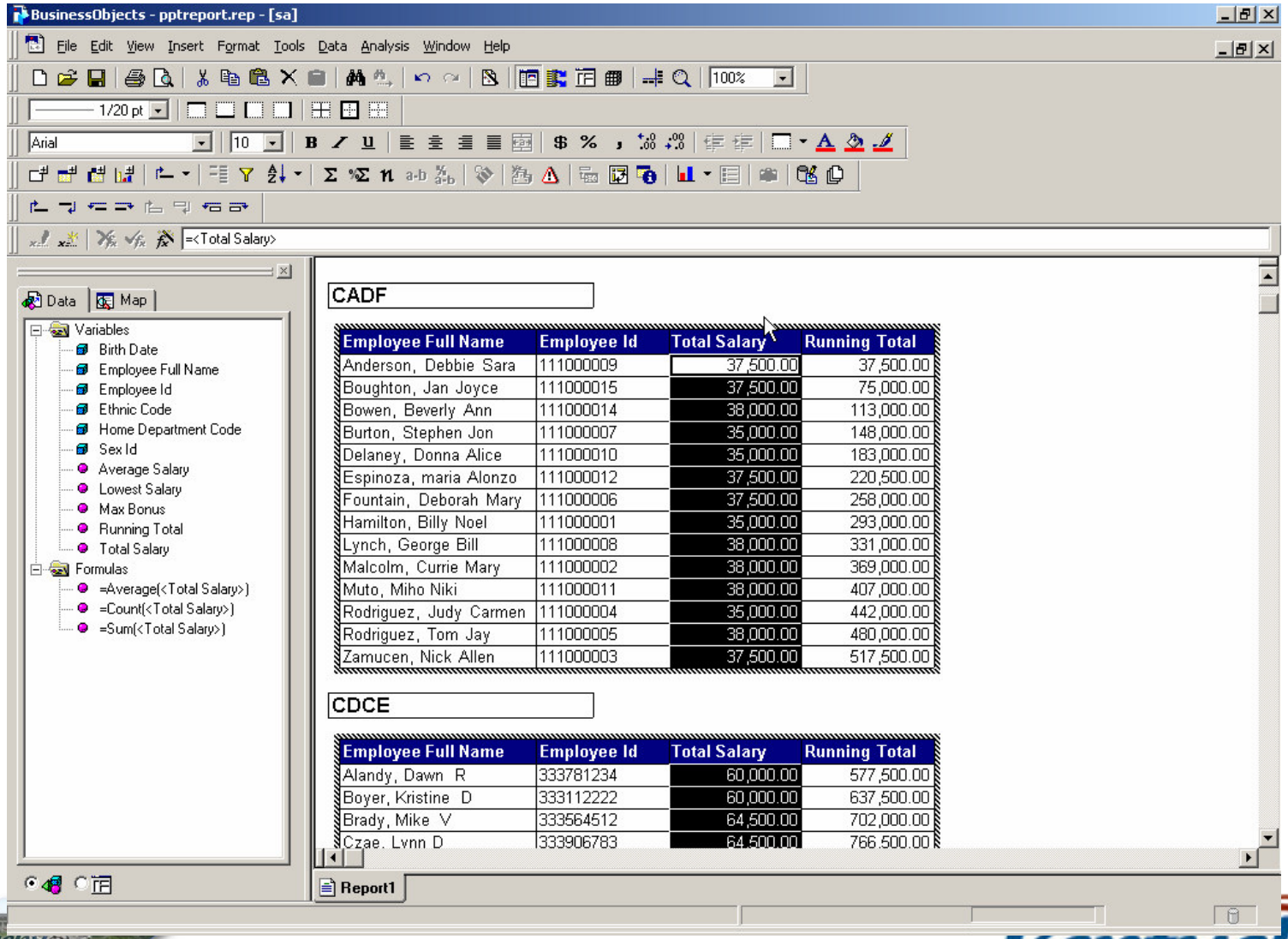


	CADF	CDCE	CDFP	CDJA	CDPE	CDPH	Sum:
F	474,500.00	1,027,000.00	229,000.00	129,000.00	26,700.00	101,000.00	1,987,200.00
M	479,500.00	394,500.00	588,500.00	695,000.00	58,200.00	232,478.00	2,448,178.00
N		60,000.00			9,700.00		69,700.00
Sum:	954,000.00	1,481,500.00	817,500.00	824,000.00	94,600.00	333,478.00	4,505,078.00

Grouping Data



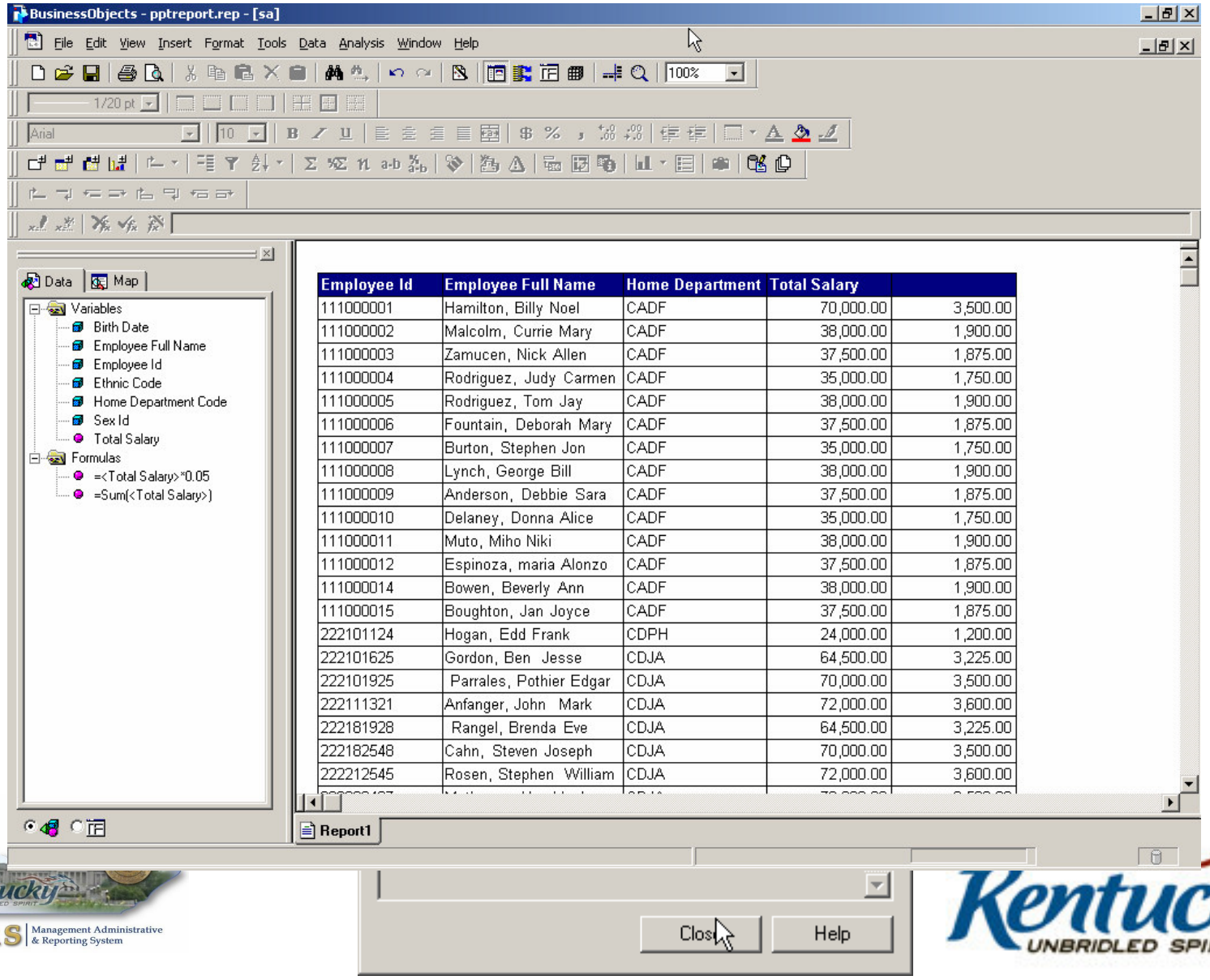
Cumulative Total



Variables and Alerts

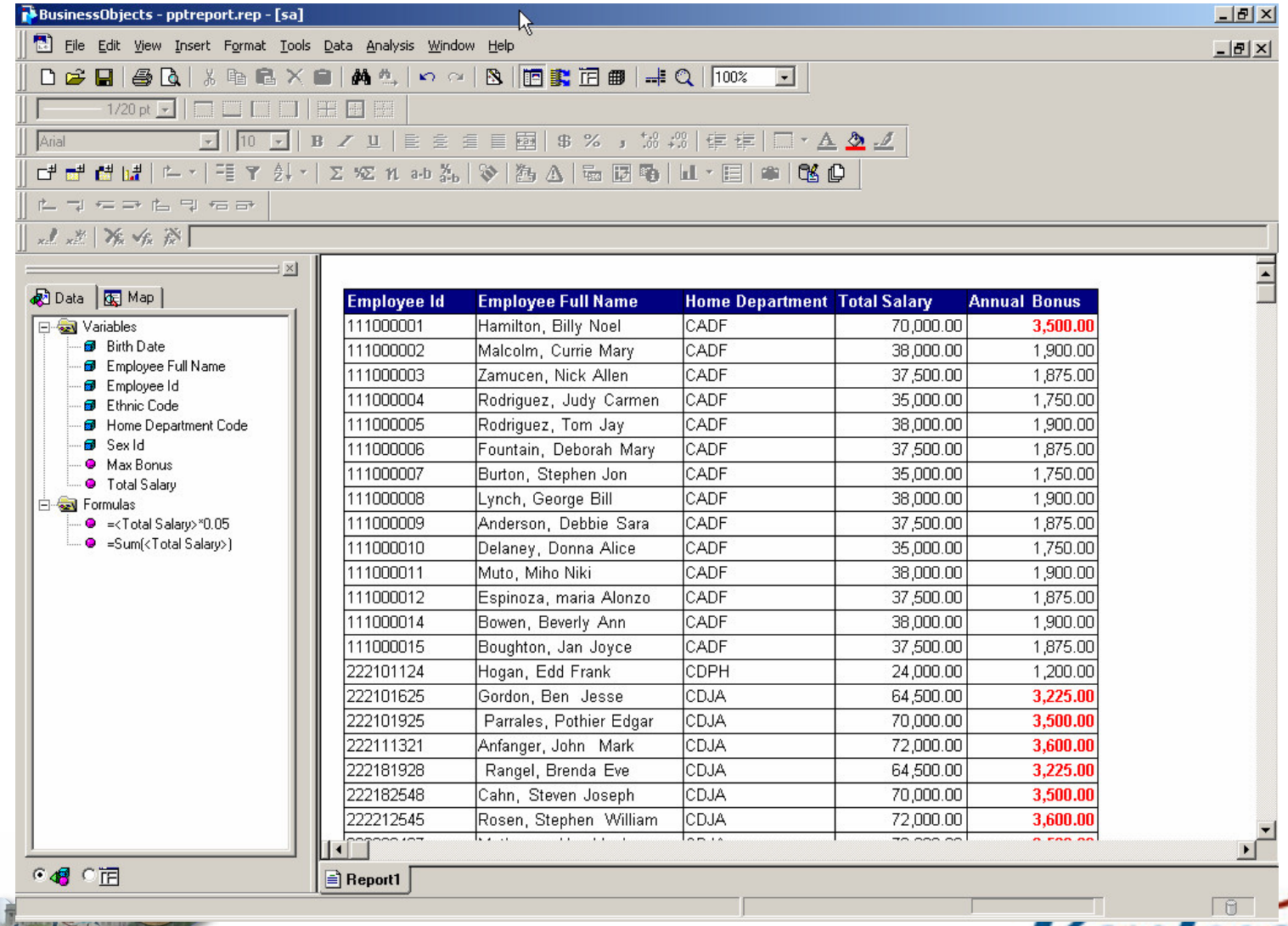
- Variable:
  - A function or formula that is saved so it can be reused later
  - NOTE: Thick Client stores variables on a local machine. Users on other computers will not be able to use user-defined variables !!! (Unlike Thin Client where it is stored on the server)
- Alerts:
  - When a cell value reaches/exceeds/is less than a predefined value, highlight the cell value

Creating Variables



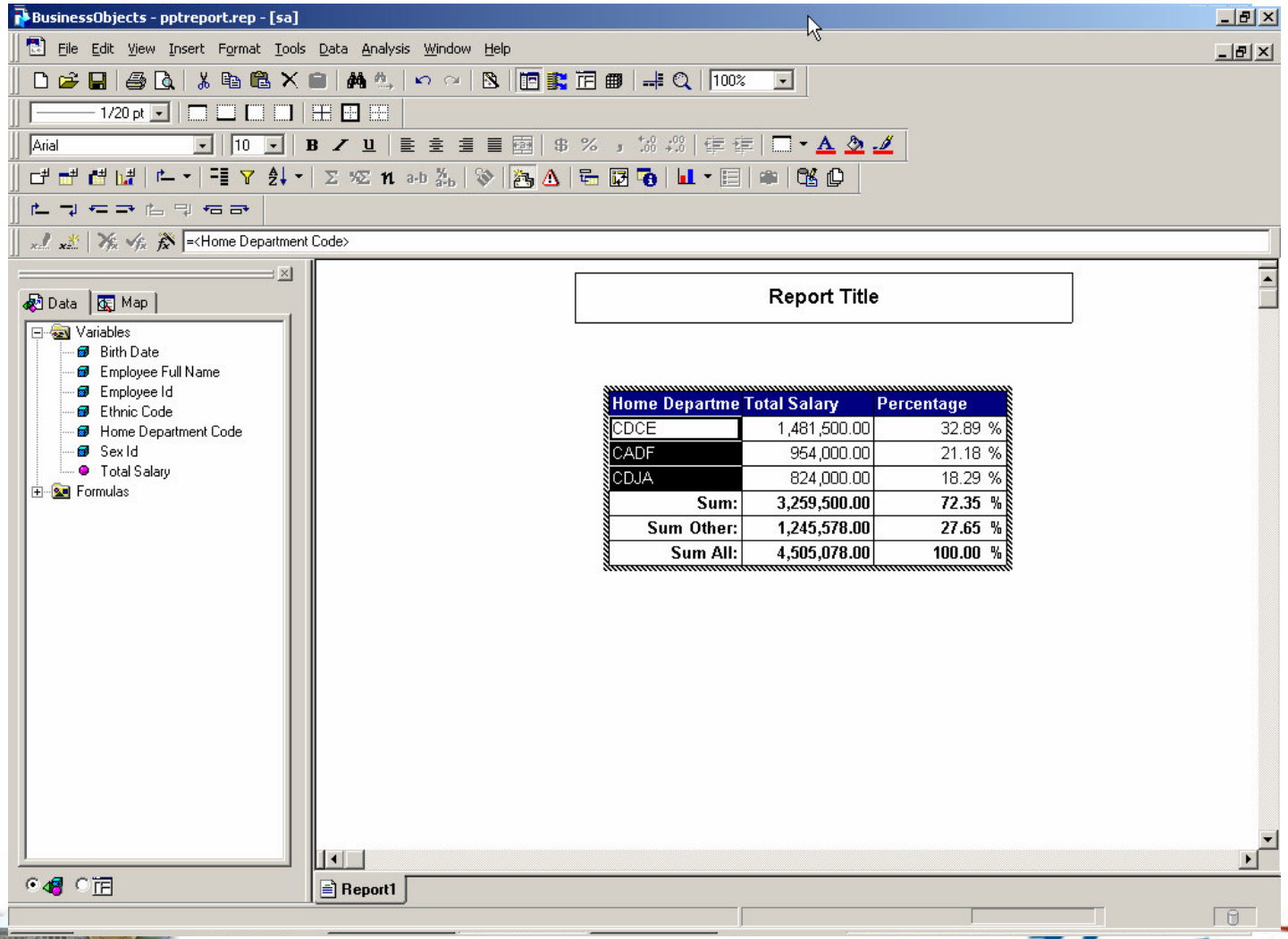
Employee Id	Employee Full Name	Home Department	Total Salary	
111000001	Hamilton, Billy Noel	CADF	70,000.00	3,500.00
111000002	Malcolm, Currie Mary	CADF	38,000.00	1,900.00
111000003	Zamucen, Nick Allen	CADF	37,500.00	1,875.00
111000004	Rodriguez, Judy Carmen	CADF	35,000.00	1,750.00
111000005	Rodriguez, Tom Jay	CADF	38,000.00	1,900.00
111000006	Fountain, Deborah Mary	CADF	37,500.00	1,875.00
111000007	Burton, Stephen Jon	CADF	35,000.00	1,750.00
111000008	Lynch, George Bill	CADF	38,000.00	1,900.00
111000009	Anderson, Debbie Sara	CADF	37,500.00	1,875.00
111000010	Delaney, Donna Alice	CADF	35,000.00	1,750.00
111000011	Muto, Miho Niki	CADF	38,000.00	1,900.00
111000012	Espinoza, maria Alonzo	CADF	37,500.00	1,875.00
111000014	Bowen, Beverly Ann	CADF	38,000.00	1,900.00
111000015	Boughton, Jan Joyce	CADF	37,500.00	1,875.00
222101124	Hogan, Edd Frank	CDPH	24,000.00	1,200.00
222101625	Gordon, Ben Jesse	CDJA	64,500.00	3,225.00
222101925	Parrales, Pothier Edgar	CDJA	70,000.00	3,500.00
222111321	Anfanger, John Mark	CDJA	72,000.00	3,600.00
222181928	Rangel, Brenda Eve	CDJA	64,500.00	3,225.00
222182548	Cahn, Steven Joseph	CDJA	70,000.00	3,500.00
222212545	Rosen, Stephen William	CDJA	72,000.00	3,600.00

Creating Alerts



Employee Id	Employee Full Name	Home Department	Total Salary	Annual Bonus
111000001	Hamilton, Billy Noel	CADF	70,000.00	3,500.00
111000002	Malcolm, Currie Mary	CADF	38,000.00	1,900.00
111000003	Zamucen, Nick Allen	CADF	37,500.00	1,875.00
111000004	Rodriguez, Judy Carmen	CADF	35,000.00	1,750.00
111000005	Rodriguez, Tom Jay	CADF	38,000.00	1,900.00
111000006	Fountain, Deborah Mary	CADF	37,500.00	1,875.00
111000007	Burton, Stephen Jon	CADF	35,000.00	1,750.00
111000008	Lynch, George Bill	CADF	38,000.00	1,900.00
111000009	Anderson, Debbie Sara	CADF	37,500.00	1,875.00
111000010	Delaney, Donna Alice	CADF	35,000.00	1,750.00
111000011	Muto, Miho Niki	CADF	38,000.00	1,900.00
111000012	Espinoza, maria Alonzo	CADF	37,500.00	1,875.00
111000014	Bowen, Beverly Ann	CADF	38,000.00	1,900.00
111000015	Boughton, Jan Joyce	CADF	37,500.00	1,875.00
222101124	Hogan, Edd Frank	CDPH	24,000.00	1,200.00
222101625	Gordon, Ben Jesse	CDJA	64,500.00	3,225.00
222101925	Parrales, Pothier Edgar	CDJA	70,000.00	3,500.00
222111321	Anfanger, John Mark	CDJA	72,000.00	3,600.00
222181928	Rangel, Brenda Eve	CDJA	64,500.00	3,225.00
222182548	Cahn, Steven Joseph	CDJA	70,000.00	3,500.00
222212545	Rosen, Stephen William	CDJA	72,000.00	3,600.00

Ranking Data



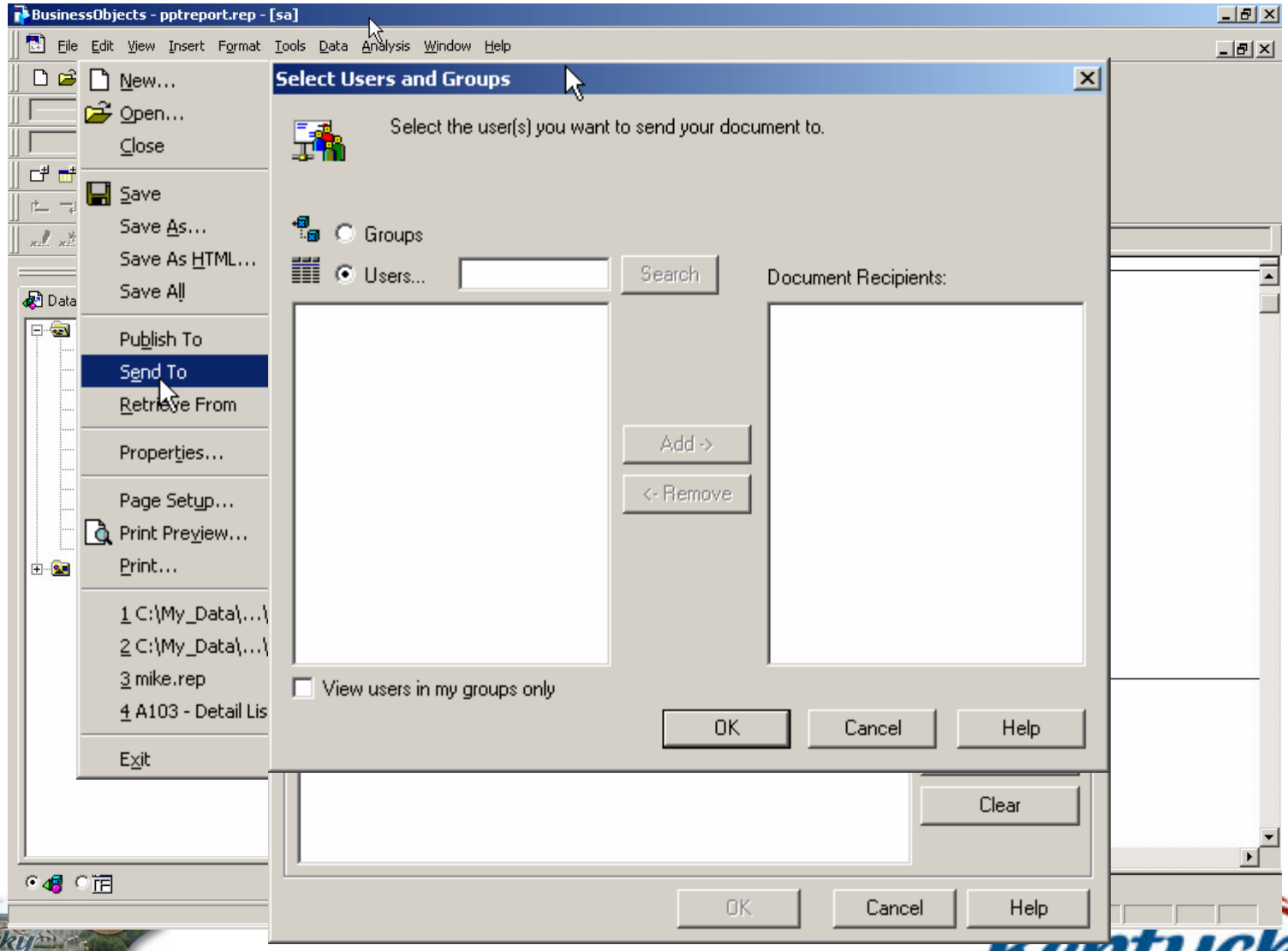
Workshop 5

- Create a variable that is 80% of the posting amount
- Create an alerter for posting amounts > 1000
- Add a break on Headquarters Account Code
- Only keep footers, no headers

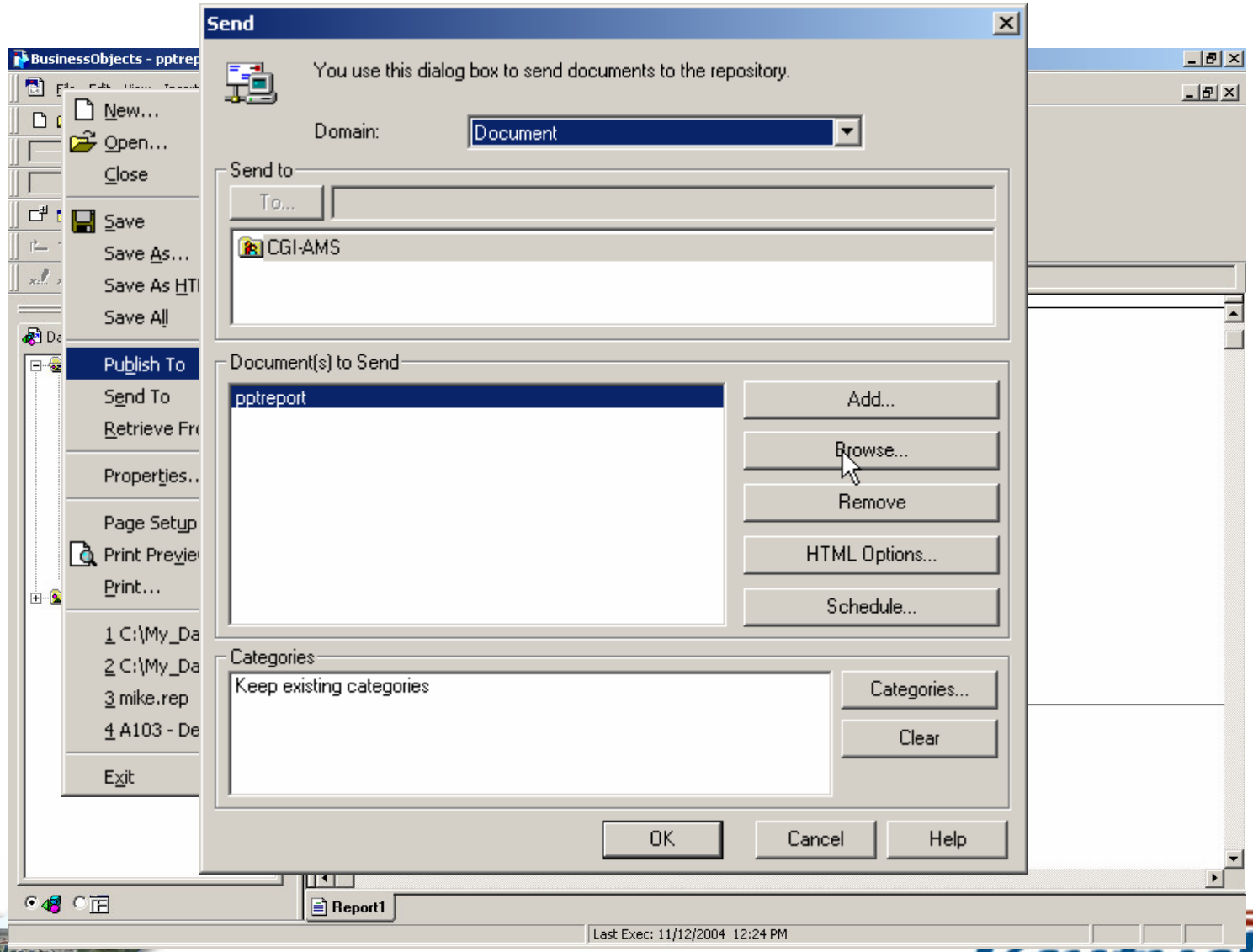
Sharing information

- Send report to users
  - Report is directly sent to selected users
  - Report will show up in users inbox
  - Report is not stored in a central place in the repository
  - NOTE: Supervisor can purge inbox contents !!!!
- Publish Report
  - Report will be put in Repository
  - All users whose security set up allows them to open report can retrieve and run report
- Save Reports
  - For personal user
  - To be printed out and handed out

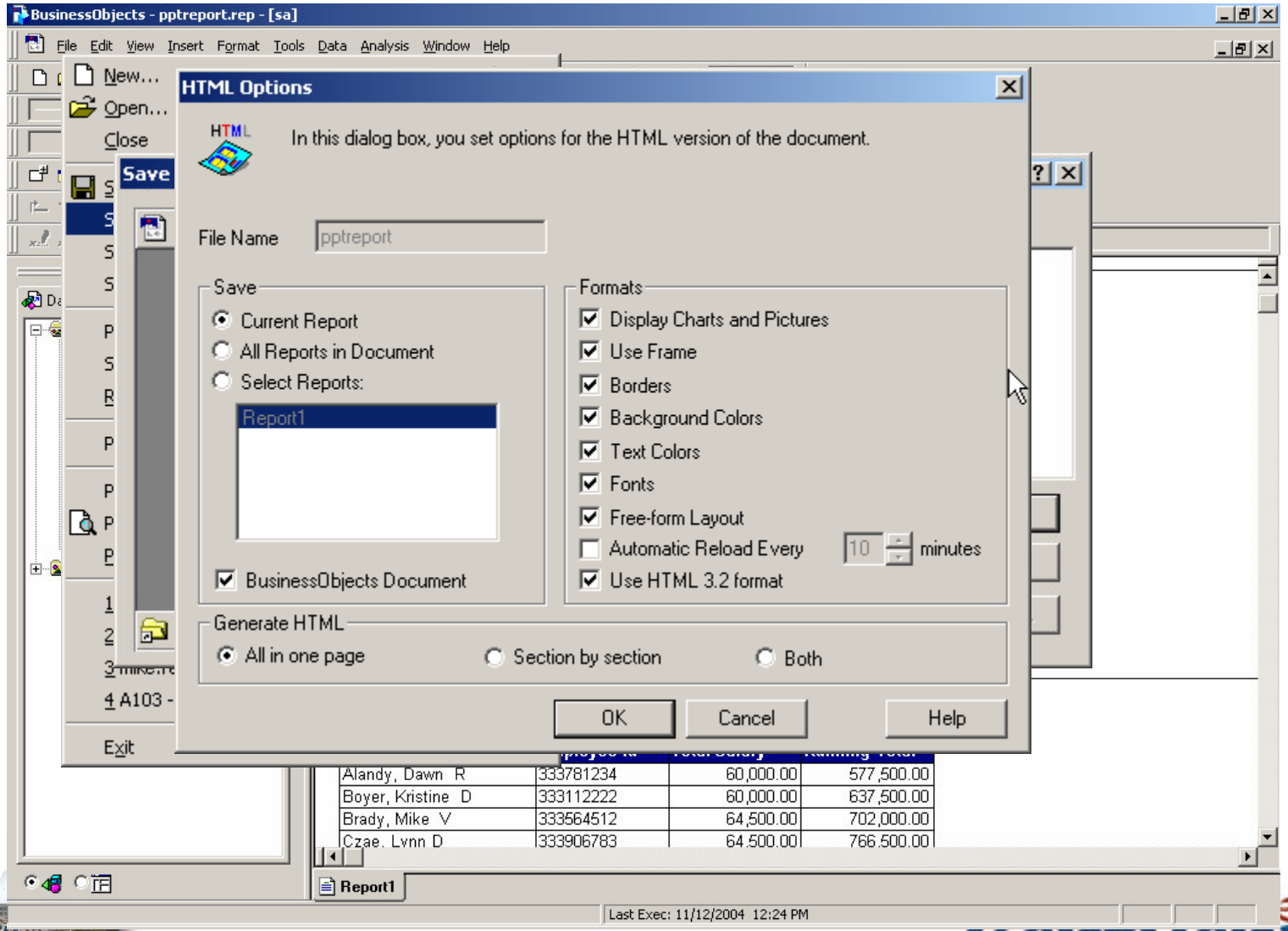
Sending Reports to Users



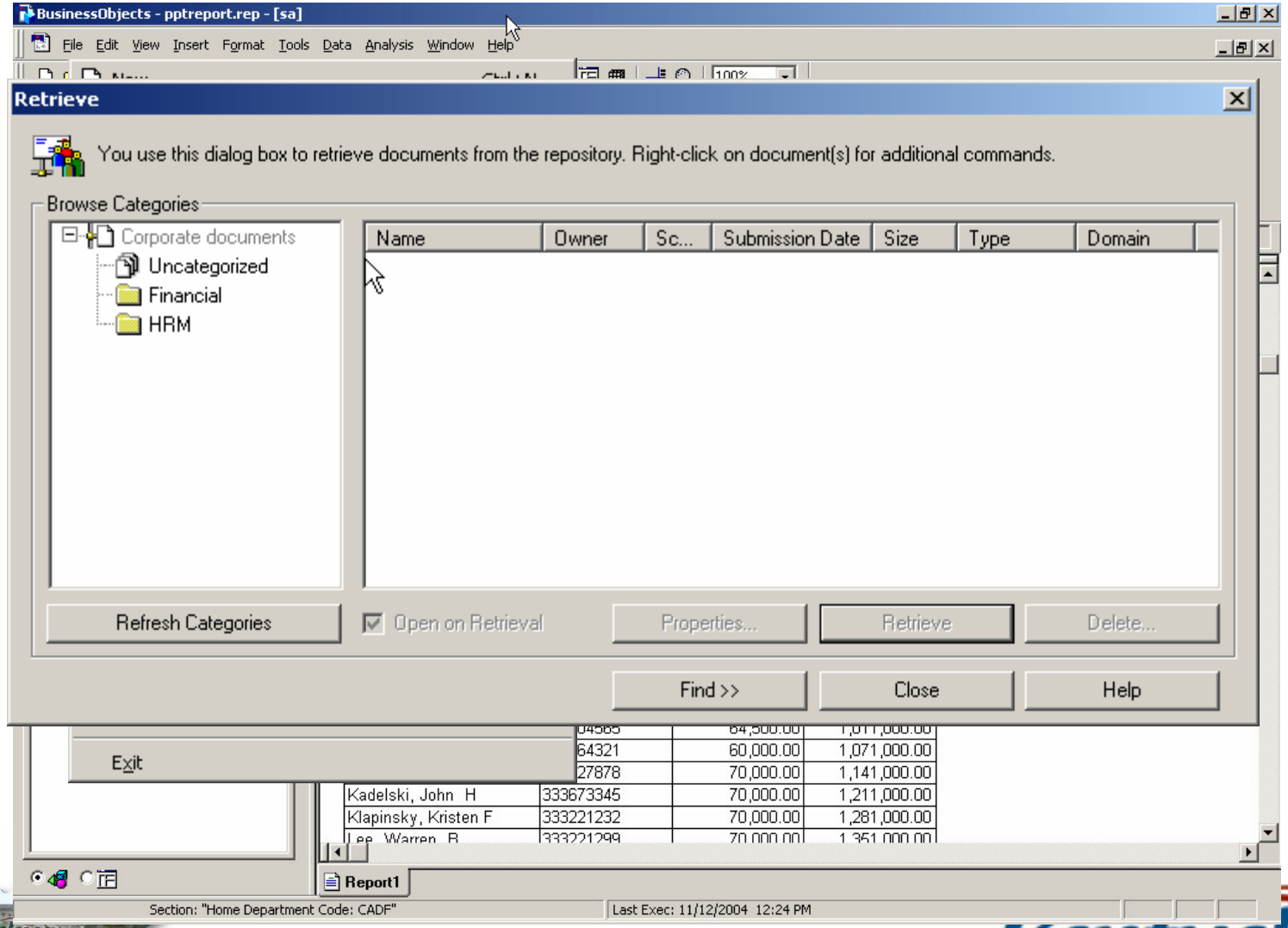
Publishing Documents



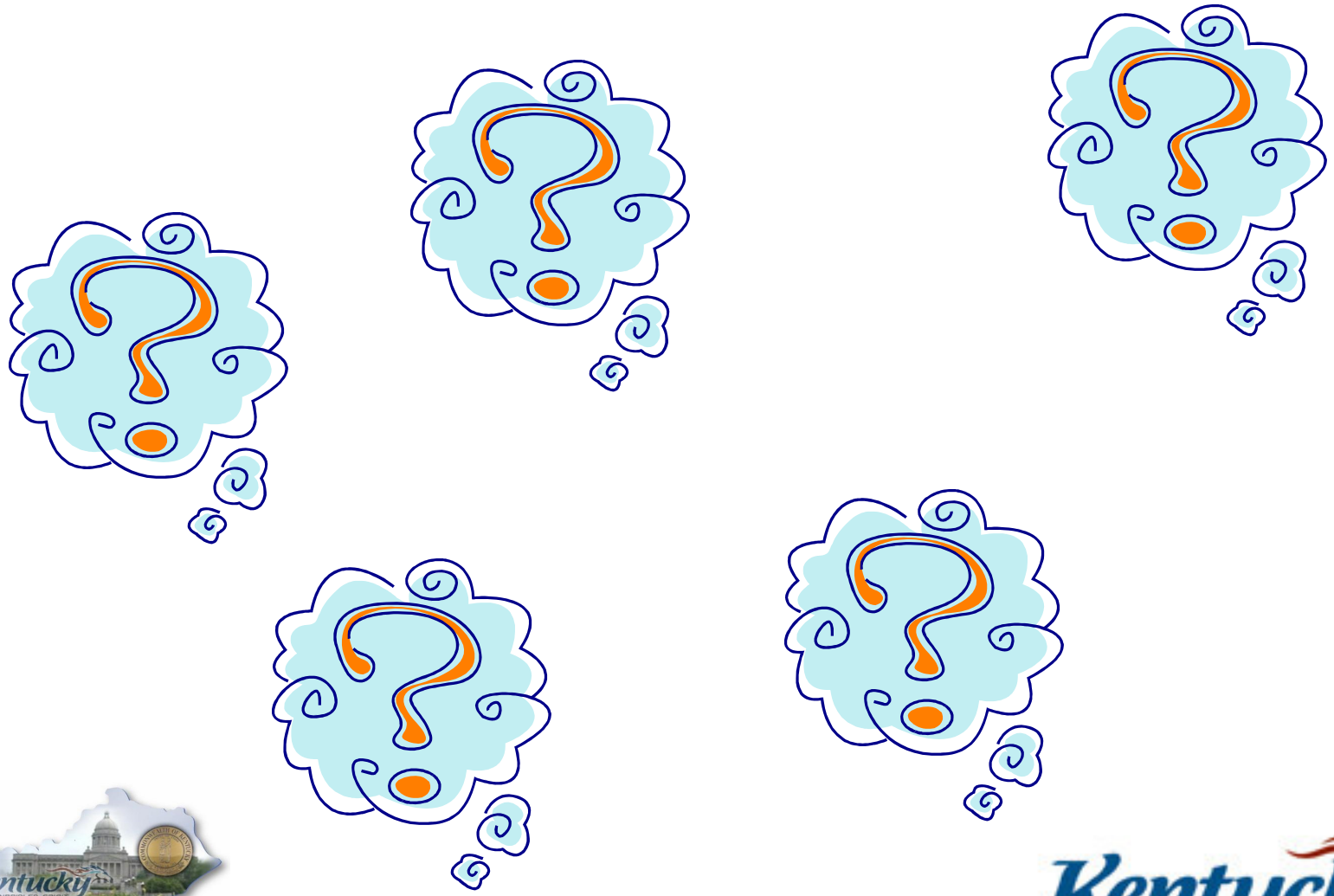
Saving as HTML, PDF, Excel



Retrieving Documents



Workshop 6

- Rename report 1 to Report 1 - <student no>
- Export report to the repository
- Open WebIntelligence and run the report

Questions